SURVEY OF TORONTO RESIDENTS' SHOPPING BEHAVIOUR

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For the
CITY OF TORONTO PLANNING AND DEVELOPMENT DEPARTMENT
STEPHEN G. McLAUGHLIN, COMMISSIONER
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CITY OF TORONTO
PLANNING AND DEVELOPMENT DEPARTMENT
SURVEY OF
TORONTO RESIDENTS' SHOPPING BEHAVIOUR

I. BACKGROUND

The post-war era has brought many changes in form and pattern as well as growth in total consumer demand for retail goods and services. The retail strips along Toronto's main streets face the challenge of adjusting to the changes and capturing the growth in order to survive and prosper. Understanding the behavioural basis of consumer demand then is the key to good planning decisions.

Recognizing this challenge, the City of Toronto Planning and Development Department has issued a series of background papers since 1976 including:

* Toronto's Retail Strips which examined the implications of a decline in a strip retailing on business, consumers, residents and physical structure.

* Support for Retail Strips gave general policy support to retail strips encouraging economic revitalization, physical improvement and more housing in proximity.

* Services to Small Business on Retail Strips encouraged formation of business associations and assigned city staff to act as technical resources in the development of realistic strategies for improvement.

* Retailing: Economic Policies for Retail Strips encourages more housing, encourages new development to support the activity in the strips and proposes to help retail strips attract more customers.

This latter report identified the scarcity of up-to-date information about consumer shopping patters and suggested hiring consultants to analyze how Torontonians view and use their retail strips and how merchants can increase their market share.

Following a public meeting and City Council's endorsement of the report, it was decided that the City should take advantage of the Federal COED program limiting the consultant assignment to the design, some administration and limited analysis of a survey of consumer shopping behaviour.

John C. Williams Consultants Limited was retained to design and conduct a market research study and to consult on the findings. The purpose of the study was to provide an improved information base about Toronto residents' shopping behaviour and attitudes as part of an overall effort to develop increasing support and revitalizing the City's strips.

A. METHODOLOGY

a) Interviewing

The sample was randomly recruited and interviewed by phone using the Toronto Telephone Directory. Quotas were established for each region of Toronto in order to ensure appropriate geographic distribution.

Interviews were conducted between July 25 and October 18, 1983. Interviewers worked Monday to Friday from 4:00 p.m. to 10:00 p.m. and on Saturday from 12:00 to 4:30 p.m. On average, the interviews lasted for 13 minutes with 1:1 completions per hour. This would suggest a completion rate of approximately 1 in 20 diallings. The completion rate includes numbers which were misdialled, busy or not answered as well as refusals and ineligible respondents.

When a resident who could not speak English was contacted, arrangements were made for the respondent to be called back in order to be interviewed in their own language. These arrangements were made through the City Planning Department in order to ensure an adequate representation of Toronto's ethnic communities. The ethnic call-back programs were not entirely successful due to the reluctance of non-English respondents to participate. Only 62% of those called back agreed to answer the questions.

Completed questionnaires were tabulated by the Data Processing Facility in Toronto City Hall. Final tabulations were completed in April 1984.

b) Sample

Respondents were residents of the City of Toronto and those neighbouring communities that are within one mile of a retail strip in the city. The number of households in the universe described is 335,000.

A total of 1,800 interviews were conducted. The chart on the following page indicates that statistically a sample of this size can be considered very reliable. For example, if 20% (or 80%) of the respondents are for or against a situation, this response can be expected to be accurate to within better than plus or minus 2.1%.

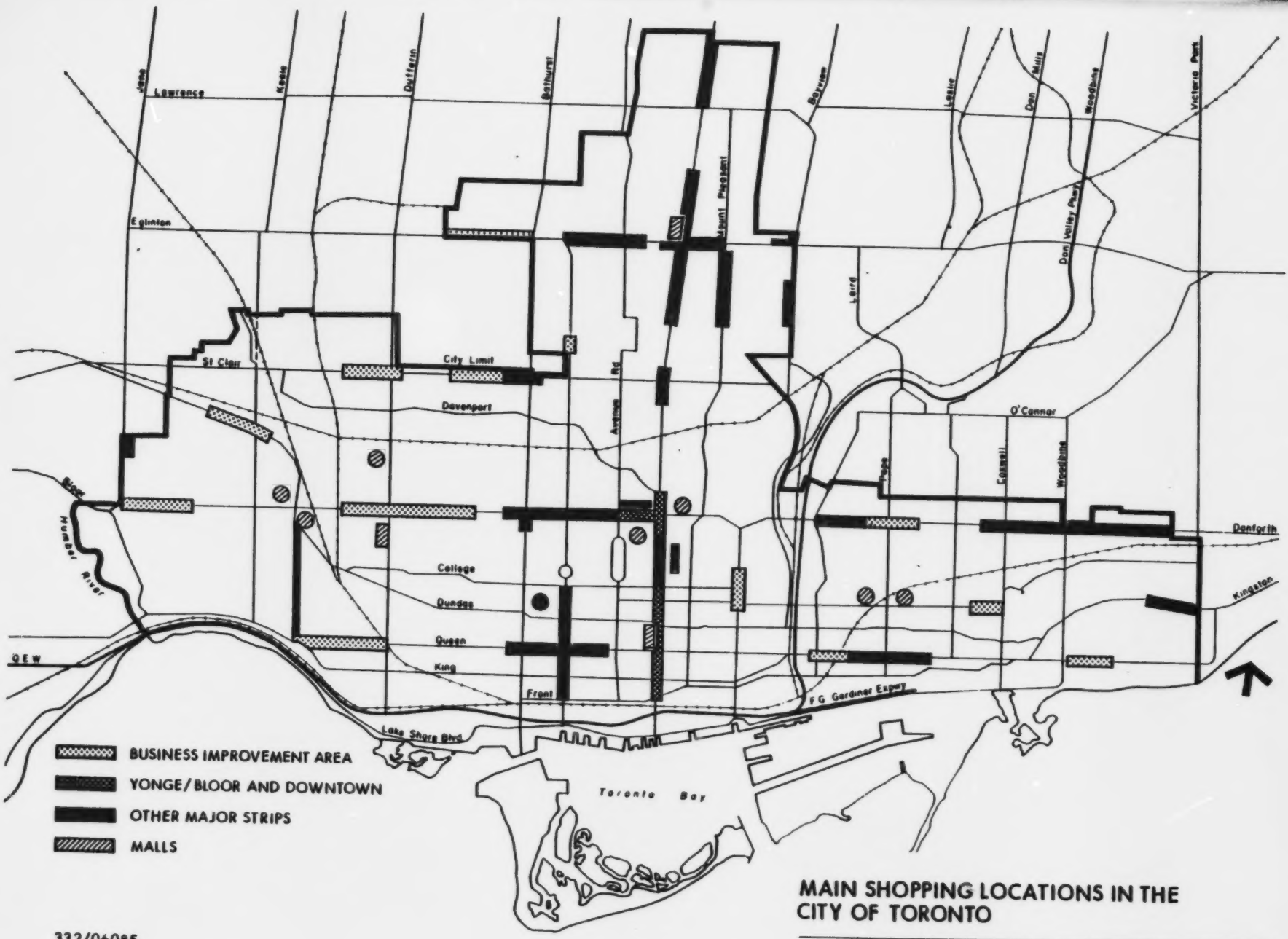
In comparing the characteristics of respondents against census data, it appears that overall the sample is representative of the population of the City of Toronto. There are some groups which appear to be under-represented. The percentage of single person households and ethnic groups in the sample is lower than suggested by census data. A more detailed analysis of the sample can be found in the appendices.

MARGIN OF ERROR TABLE (95% Confidence Level) TABLE 1

(Percentages Giving a Particular Answer)

Sample Size	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%
200	3.1	4.2	5.0	5.7	6.1	6.5	6.7	6.9	7.0	7.1
250	2.8	3.8	4.5	5.1	5.5	5.8	6.0	6.2	6.3	6.3
300	2.5	3.5	4.1	4.6	5.0	5.3	5.5	5.7	5.7	5.8
400	2.2	3.0	3.6	4.0	4.3	4.6	4.8	4.9	5.0	5.0
500	1.9	2.7	3.2	3.6	3.9	4.1	4.3	4.4	4.4	4.5
600	1.8	2.4	2.9	3.3	3.5	3.7	3.9	4.0	4.1	4.1
700	1.6	2.3	2.7	3.0	3.3	3.5	3.6	3.7	3.8	3.8
800	1.5	2.1	2.5	2.8	3.1	3.2	3.4	3.5	3.5	3.5
1,000	1.4	1.9	2.3	2.5	2.7	2.9	3.0	3.1	3.1	3.2
1,500	1.1	1.5	1.8	2.1	2.2	2.4	2.5	2.5	2.6	2.6
2,000	1.0	1.3	1.6	1.8	1.9	2.0	2.1	2.2	2.2	2.2

This table sets out the likely margin of error for survey results from various sample sizes. For example, given a sample of 400, an answer with 20% (or 80%), for or against a situation can be expected to be accurate to within plus or minus 4.0%.



MAIN SHOPPING LOCATIONS IN THE CITY OF TORONTO

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B. DEFINITIONS

a) Shopping Districts

These definitions are presented at the beginning of this report in order to assist the reader in understanding the Recommendations and Summary of Findings. A complete listing for each kind of district are appended.

i) Business Improvement Areas (BIA's) (14 in the study)

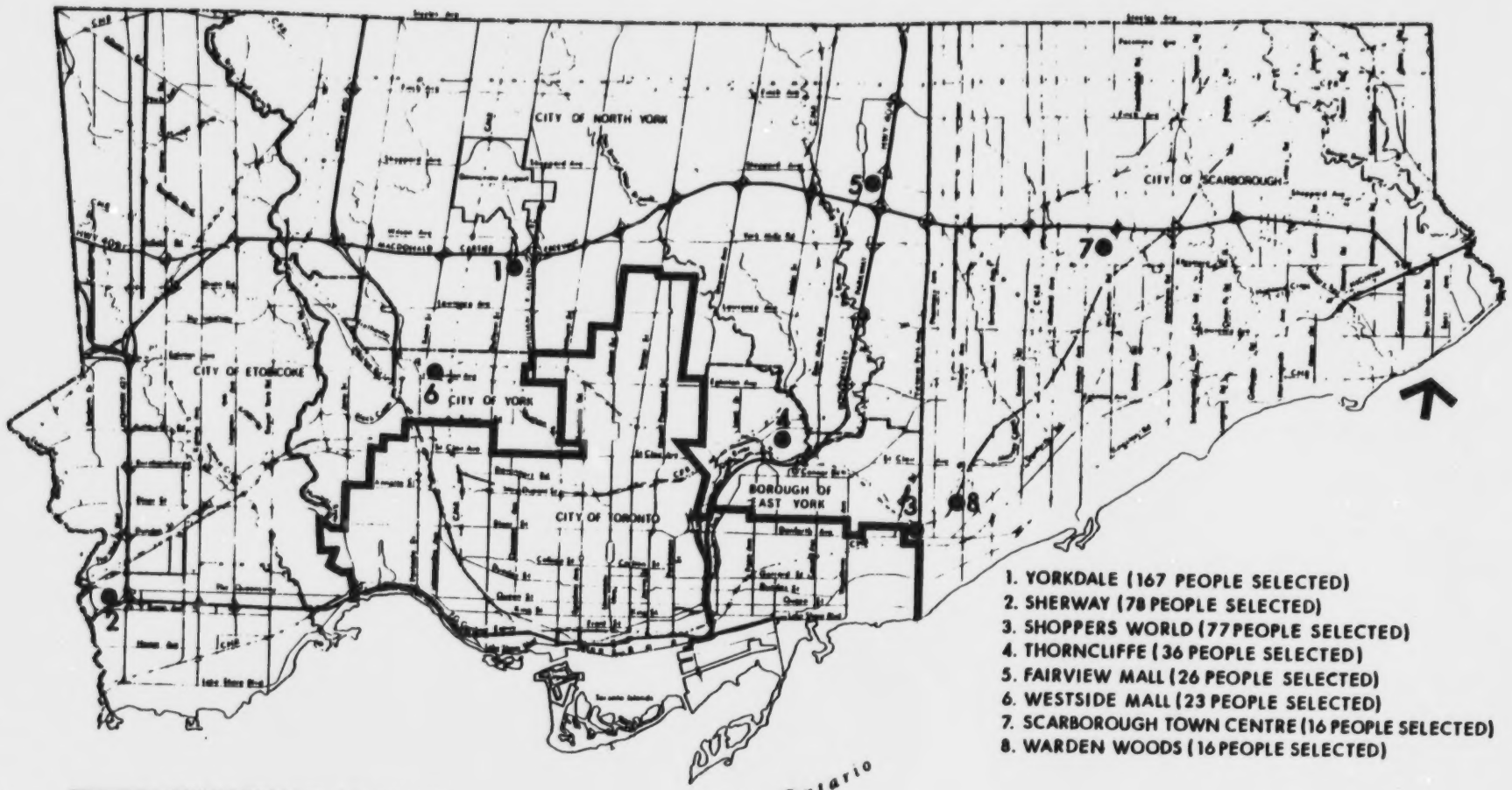
These are traditional shopping streets or retail strips located in the City of Toronto. The BIA's have been designated by the City at the request of the local business community. The designation allows a special tax levy to be charged in the area in order to finance an improvement program.

ii) Other Major Strips (28 in the study)

All shopping strips, other than BIA's which were chosen by at least 0.5% of the sample as the strip, they used the most.

iii) Yonge Street Strip/Yonge Bloor Area

The areas along Yonge Street and Bloor Street around this intersection as well as Yonge Street from College to Front Streets. This area was segregated from other strips because of its unique character and because merchandise purchased here tends to be different from that purchased at other retail strips.



1. YORKDALE (167 PEOPLE SELECTED)
2. SHERWAY (78 PEOPLE SELECTED)
3. SHOPPERS WORLD (77 PEOPLE SELECTED)
4. THORNCLIFFE (36 PEOPLE SELECTED)
5. FAIRVIEW MALL (26 PEOPLE SELECTED)
6. WESTSIDE MALL (23 PEOPLE SELECTED)
7. SCARBOROUGH TOWN CENTRE (16 PEOPLE SELECTED)
8. WARDEN WOODS (16 PEOPLE SELECTED)

CITY OF TORONTO BOUNDARIES

MAJOR SHOPPING LOCATIONS OUTSIDE OF THE CITY OF TORONTO

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iv) Total Strips

This category contains all traditional shopping streets designated in the study. It includes BIA's, major strips, Yonge Street, Yonge and Bloor, and a number of smaller strips. These smaller strips were chosen by less than 0.5% of the sample, as the strip they used most.

v) Malls in City

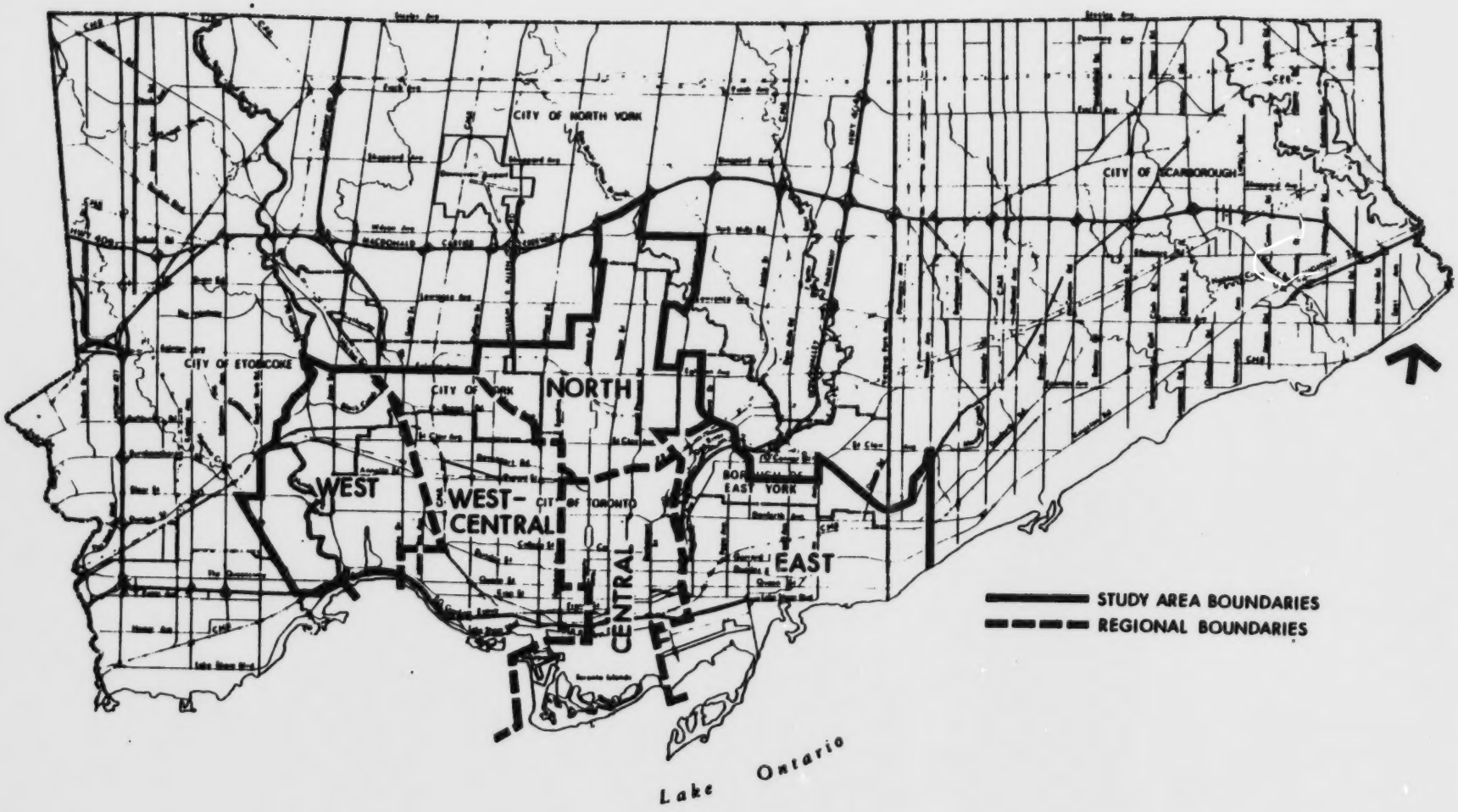
These malls are enclosed shopping locations which have a department store and usually a supermarket as tenants. They are all located within the boundaries of the City of Toronto, e.g. Eaton Centre, Gerard Square.

vi) Other City Locations

This category includes small shopping centres and other free standing stores located within the boundaries of the City of Toronto.

vii) Out of City Locations

Shopping areas located outside the City limits, large regional malls as well as smaller local malls are grouped in this category, e.g. Yorkdale, Fairview Mall.



STUDY AREA AND REGIONAL BOUNDARIES

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b) Regions

The City of Toronto was divided into five geographic areas for this study. The boundaries, described below, are irregular because they follow census tracts.

i) West

North: Eglinton Avenue
West: Humber River and Mimico Creek
East: C.N.R. Tracks
South: Gardiner Expressway

ii) West/Central

North: Eglinton Avenue and Briar Hill
West: C.N.R. Tracks
East: Vaughan Road and Spadina Avenue
South: Lake Ontario

iii) North

North: Briar Hill, 401 and York Mills Road
West: Vaughan Road and Spadina Avenue
East: Bayview Avenue, Mount Pleasant Avenue and Don River
South: C.P.R. Tracks

iv) Central

North: C.P.R. Tracks
West: Spadina Avenue
East: Don River
South: Lake Ontario, including Toronto Island

v) East

North: Cosburn Avenue and Hydro Corridor
West: Don River
East: Warden Avenue
South: Lake Ontario

II. SUMMARY

A. GENERAL FINDINGS

Retail strips are very important shopping locations in the City of Toronto. They receive a very significant share of purchase/use for all types of merchandise and service.

Strips dominate:

convenience food	67%
hardware	68%
books, records, tapes	61%
health & beauty	52%
services	65-74%
food services	60-62%

Strips have a significant share of:

grocery shopping	46%

Strips have an important but somewhat weaker role for:

footwear	37%
kitchen utensils	34%
clothing	33%
furniture	30%

* Alternatives to purchasing merchandise/services from strips vary significantly. Generally, there is no strong alternative choice for convenience foods and services, but there is a significant outflow of shopping to out-of-city locations for main grocery shopping and furniture. In-city malls are the most important location for clothing, footwear, and kitchen utensils.

* Retail strips are very important shopping locations in the City of Toronto because, besides attracting a high share of shoppers, they attract shoppers more frequently than malls. Forty-seven percent of those who visited a retail strip did so nine or more times in the past eight weeks, compared to only 22% for a comparable frequency of visits to malls.

* Only 11% of Torontonians did not shop at strips, with the main reason being convenience.

* The most important area or location factors in choosing a shopping location, and the percentage of Torontonians rating strips and malls as excellent in these factors are:

Area/Location Factor (% Rating Factor Important)	Percent Rating Factor as Excellent in:	
	Strips 20%	Malls 20%
Needed Goods at Right Price (61%)	56	60
Comfortable & Safe (46%)	25	42
Selection of Stores (43%)	76	72
Accessible to Public Transit (38%)	74	39
Convenient Location (36%)	12	58
Parking (31%)		

Visual and social factors were not rated highly by many shoppers. The environmental improvement which was most often suggested by respondents who found the visual appeal of their strip very low was a general facelift for the stores.

* The most important store factors in choosing a shopping location, and the percentage of Torontonians rating strips and malls as excellent in these factors are:

Store Factor (% Rating Factor Important)	Percent Rating as Excellent in:	
	Strips	Malls
Clean & Up-to-Date (47%)	30%	54%
Friendly Staff (44%)	33	22
Open during Evening (32%)	17	63

* Visual improvements that might increase frequency of strip shopping are (in order of preference) more:

  - public washrooms
  - benches
  - rain/weather cover
  - trash containers
  - flowers and trees
  - bright street lights
  - bike racks
  - decorative street lamps

* Parking did not receive consistent "high concern" ratings, and is an "issue" mainly with higher income and/or North Toronto residents. Where parking was considered a problem at strips, the reason most often given was that there was not enough space. There was an indication that if the City built extra parking space and charged 25¢ an hour, that would mean increased shopping at strips.

* When asked if there were changes that could be made to the strip where the respondent shopped that would encourage a switch from mall shopping, less than 15% had ideas. There were better variety of stores/ clothing stores/other stores (14/12/9%), parking (8%) and a supermarket (7%).

B. OBSERVATIONS & RECOMMENDATIONS

1. OBSERVATIONS

* Retail strips in general, and healthy ones in particular, are a largely unrecognized powerhouse in Toronto retailing where they play an important and formidable role in servicing local communities with convenience merchandise and services.

* In certain instances, they have developed a drawing power beyond a normal geographic trading area, e.g. the Yonge Street strip's high share of books, records and tapes.

* There is a hierarchy of retailing in Toronto, with retail strips at the top.

Strips:

Convenience services Convenience foods Convenience merchandise	60-75% share of market very frequent usage

Malls:

Convenience and groceries	20%
Shopping type merchandise and furniture	30-45%

Outlying Areas/Malls:

Furniture Specialty products/services	15-35%

* Retail strips cannot significantly increase their share of market by taking it away (opening new stores) from malls or out-of-City retail locations because:

  a) The fashion apparel stores require large trading areas draw and high traffic exposures.

  b) Many national apparel, etc. chain stores have policies of "mall location only".

  c) The densely developed retail strips do not have the space for the very large furniture and food retail outlets (e.g. Leons, Pascal, Loblaws Super Store) which require huge warehouse type buildings at low occupancy costs.

  It's neither possible nor practical for retail strips to fill the role of malls. They should not try.

* Retail strips play a unique role as "incubators of retailing". It is practically impossible for first time retail entrepreneurs to get mall locations (because of the high rent and financial requirements) so the low rents and low store decor and fixturing costs (minimal entry cost) attract new and different retailers. Where strips offer a variety of unique independents they can grow beyond their convenience/ service role, e.g. the Beaches.

2. RECOMMENDATIONS

A STRATEGY FOR SUCCESS

* Retail strips should formulate a specialty strategy for growth of:

  a) Reflecting the unique needs of the immediate trading area.

  b) Ensuring that it has a very strong base of convenience stores and services.

  c) Encouraging new, different, independent specialty stores to the strip.

  d) Offering a visual and service shopping environment that is different (and better) than at present.

  e) Communicating this effectively to the trading area.

REQUIREMENTS & PRIORITIES FOR SUCCESS

This study indicates that there is a logical hierarchy of factors that must be in place for a successful retail strip. All of these may not be immediately possible or practical, but they should be acknowledged, planned and strived for.

MARKET

This research study indicates that retail strips can and usually do compete effectively against other forms of competition - provided they appeal to and serve the needs of their market place.

There is a need to ensure that:

- ethnic needs are met;
- the under 30 year segment is appealed to, as this is a weakness of strips.

REQUIRED RETAIL MIX

The retail mix must recognize and address the role of the retail strip. It is a wise business strategy and policy to focus on strengths and abandon (or ignore) weaknesses. Strips must focus on their role as the key convenience and service location for Torontonians.

Convenience Services - High Priority

* Services

  A full range of hairdressing, barber, banking, dry cleaning, laundry, shoe repair, optician, travel, copy/print, banks, trust, travel, rentals, repairs, real estate, photo, film, ticket, lottery, keys, gasoline and auto repairs.

* Convenience Food

- These are based on the traditional Macs and Beckers.
- New varieties such as Mini-Mart.

* Fast Food

- A combination of eat-in or take-with.
- More important as 45% of women over 18 are now working out of the home.
- Opportunity for ethnic foods and beverages.
- An element of entertainment, plus day and night time usage.

* Entertainment

- A role for day and night use.
- Wide variety, from theatres (of all types) to arcades.
- Opportunity to complement food and restaurant stores.

* Restaurant

- See Fast Food notes.
- Also, an opportunity to build a special draw beyond trade area if one or more are exceptional.

Convenience Merchandise - High Priority

* Hardware

  - A must have store.

* Drug Store

  - A must have store.
  - Important to have full services and hours.
  - New types of health (natural foods etc.) and beauty (hair and beauty) specialty shops are in the market.

* Tobacco, News

  - A must have store.
  - Can expand into paperbacks, magazines and novelties.

* Stationery & Books

  - Need for local businesses.

* Records & Tapes

  - Should relate to youth market segment.

* Hobby, Craft, Photo

  - Can have both local and longer range drawing power.

* Liquor & Beer Store
  - With appropriate parking.
* Florist

Shopping Merchandise - Important Priority

* Specialty Foods
  - An important commodity, with great potential for success. Specialty food retailers can be classified by (a) commodity (e.g. bakery, butcher, green grocery, and/or (b) ethnic appeal (e.g. kosher deli, Chinese imports, Scottish butcher,French patisserie, and/or (c) by lifestyle (e.g. prepared foods to go, pasta, health foods).
* Supermarkets
  - The traditional supermarket industry has fragmented into many types of outlets which range from hypermarket/superwarehouse stores (100,000 sq.ft.), combo food/drugs/miscellaneous (+50,000 sq.ft.), supermarkets (now 30,000 sq.ft.) to specialty markets (15-20,000 sq.ft.), limited line box/no-frills stores ($\pm$10,000 sq.ft.), specialty upscale convenience markets ($\pm$5,000 sq.ft.)

  - The very large superwarehouse and combo stores cannot locate on strips, but the smaller varieties of "supermarkets" can certainly prosper in these locations. Parking lots/ garages may or may not be needed, but would help the large, full product range stores where weekly family shopping is done.

* Childrens
  - Serve local families.
* Footwear
  - Both family and specialty stores.
* Jewellery
  - Repair for local services.
  - Merchandise for gifts and personal use.
* Video, Electronics
  - For easy rental and return, repairs and local service.
* Female Apparel & Accessories
  - Must relate to local market and be a true specialist.
* Gift
  - Opportunity for wide range of personal and household gift stores.
* Home Accessories & Decorating
  - Paint and wallpaper, for easy pick up of heavy products.

Lower Priority Merchandise

Sporting Goods
Lumber & Building Supplies
Television & Appliances
Furniture
Floor Covering

REQUIRED SERVICES - High Priority

The following shopper services must be provided:

* A Safe & Comfortable Shopping Environment - where shoppers can feel at ease without worry.
  Preferably there should be:
  - a visible police presence,
  - no threat of "rowdies",
  - convenient benches,
  - rain/weather cover,
  - good lighting.

* Good Access by Public Transit - is a necessity, as it is an important source of shopper traffic.

* Parking - is critical to a specific segment of shoppers. The need for large parking lots will vary by strip.

* Hours of Operation - should be given careful consideration. Open during evenings was given a fairly high (32%) importance rating for choosing a location. Malls were rated highly (63% excellent) for this factor while strips were rated poorly (only 17% excellent).

* Friendly Sales Service - is a highly regarded factor to shoppers. Strips do better than malls, and every effort should be made to upgrade this service feature.

REQUIRED VISUAL ELEMENTS

Although the visual elements of strip shopping are less important than retail mix and service they can contribute to a "comfortable" and enjoyable shopping experience. As well, because malls are seen to out-perform strips with this factor, serious effort must be made to narrow the gap.

* A Facelift for Stores - is the major consideration. It is logical to start the upgrading of store exteriors and interiors as obviously the stores themselves are the key element in retail environment.

* Trash Cans and Collection of Trash - is important to shoppers.

* Flowers, Trees - are improvements that shoppers like on strips.

* Wider Sidewalks, Decorative Lights, Attractive Signs, New Sidewalk & Brick Sidewalk - are all requested, but lower priority elements to shoppers.

REQUIRED COMMUNICATIONS

An additional strategic element for a healthy strip should be effective communication to its target market. Although strips have a tight geographic trading area and are visited frequently, shoppers do feel frequent sales and specials are important. As well, some strips have unique stores (either merchandise and/or ethnic mix) that can draw market share from other areas.

* Advertising, Promotion & Special Events - can play an important role in emphasising the strengths of individual and collective retailers and their specials or sales.

III. DETAILED FINDINGS

A. SHOPPING CHARACTERISTICS

1. Purchases by Type of Shopping Area

a) Share of Purchases

Respondents were asked to name the location where they had made purchases of various consumer products and services. Retail shopping strips drew a higher share of all purchases than any other type of shopping area.

Retail strips showed the greatest purchase strength for smaller convenience items such as hardware, books/records/tapes, convenience food, and for services such as cleaner, hairdresser, entertainment. Respondents were less likely to purchase shopping-type goods such as furniture and clothing at strips.

The purchases made at shopping strips were divided into those made at BIA's (Business Improvement Areas), other major strips, Yonge Street Strip/ Yonge and Bloor area, (see Appendix I).
Yonge Street Strip/Yonge and Bloor area were segregated because of the difference in their character from other neighbourhood shopping strips. This difference was confirmed in the strength of purchase share for these areas compared to other types of strips.

Business Improvement Areas had higher share of purchases for:

SHARE OF PURCHASE BY SHOPPING AREA

	BIA's (%)	Other Major Strips (%)	Yonge/ Yonge & Bloor (%)	Total Strips (%)	Other City Locations (%)	Malls in City (%)	Out of City (%)
Main Grocery Shopping	11	25	2	46	19	11	23
Convenience Food	15	30	3	67	12	3	18
Clothing or Fabric	6	12	13	33	1	42	23
Footwear	8	12	14	37	2	38	23
Hardware	19	28	13	68	5	7	20
Furniture	5	12	8	30	3	34	34
Utensils - Pots & Pans	5	11	13	34	1	44	21
Books/Records/Tapes	4	19	35	61	3	20	15
Health/Beauty Prod.	14	23	8	52	8	21	18
Laundry/Dry Cleaner	16	35	4	74	8	2	16
Hairdresser/Barber	11	35	9	68	6	7	19
Restaurant Meal	9	27	11	60	12	6	21
Snack	12	28	11	62	9	9	19
Entertainment	9	22	26	66	16	6	12
Banking Services	16	26	11	65	15	3	17

Question: ... Think back to the last purchase and tell me the <u>exact</u> location where you made that purchase.

- hardware/tools
- services - such as banking and laundry/dry cleaning
- convenience food.

The strength in purchases at major strips reflected what was found at BIA's with a greater emphasis on services. Major strips received their highest share of purchases for:

- services - laundry/dry cleaning and hairdresser/barber
- convenience food
- hardware.

Yonge Street/Yonge and Bloor strip showed outstanding purchase strength for:

- books/records/tapes
- entertainment.

The commodities which City residents were least likely to buy at shopping strips were:

- furniture
- home furnishings - pots, pans, dishes, ornaments, etc.
- clothing.

These commodities tended to be purchased at City malls. Highest share of purchases for City malls were for:

- home furnishings - pots, pans, dishes, ornaments, etc.
- clothing
- footwear
- furniture.

City residents tended to shop at out-of-city locations for:

- furniture
- clothing
- footwear
- their main grocery shopping.

In order to better understand the customer who shops in the different kinds of shopping areas, several commodities have been chosen for more in-depth customer analysis. Retail food purchases (regular and convenient), hardware and services (laundry, dry cleaning and banking) will be analyzed because of the relatively high share of purchases which BIA's and strips enjoy. Clothing and footwear purchases will be analyzed because, although strips do not receive a high share of purchase, there was some indication that clothing might be an area of opportunity for retail strips.

b) Customer Characteristics - Retail Food Purchases

Overall, retail strips are very strong in this category of purchases. BIA's and major strips are the areas which contribute to this strength. The shoppers who have the greatest tendency to buy food at strips are residents of North and West/Central Toronto and those who speak a second language at home.

Business Improvement Areas attracted higher shares of food purchases from:

- those who speak a second language in the home
- residents in the West and East areas of Toronto.

SHARE OF RETAIL FOOD PURCHASES BY SHOPPING AREA*

	BIAs (%)	Major Strips (%)	Yonge/ Y & B (%)	Total Strips (%)	Other City Loc. (%)	Malls in City (%)	Out of City (%)
Total	13	27	3	55	16	8	21
Age							
Under 30	12	26	3	56	16	8	20
30 - 39	15	26	3	59	18	5	18
40 - 59	13	30	2	55	15	8	22
60 and Over	9	28	3	52	13	9	26
Income							
Under $20M	14	26	3	57	20	8	15
20M - 30M	13	29	3	57	15	7	21
30M - 40M	12	26	3	55	15	7	23
Over $40M	11	30	3	57	16	6	21
Speak Second Language	16	27	4	61	16	8	15
Live in Apartment	11	29	4	56	20	9	15
Own House	14	26	1	56	13	6	25
Own a Car	13	26	1	53	14	7	26
Regions							
West	22	9	-	46	10	7	37
West/Central	16	24	-	67	11	11	11
North	8	54	-	64	5	9	22
Central	4	20	13	48	42	6	4
East	18	28	-	43	17	7	33

* Excluding purchases made outside of designated locations.

Question: ... Think back to the last purchase and tell me the exact location where you made that purchase (main grocery shopping and convenience food).

Major strips demonstrated strength among:

- o middle aged (40-59 years) residents
- o higher ($40m+) income respondents
- o residents of the North areas of Toronto.

Strips face major competition for food purchase from two areas: out-of-city locations, and from "other" areas within the city.

Retail food purchases which were made outside the City tended to be bought by:

- o older (60+ years) customers
- o car owners
- o residents of the West and East areas of the City.

Other city locations had relatively high purchase shares of retail food among:

- o those with lower (-$20m) incomes
- o apartment dwellers
- o residents of Central Toronto.

c) Customer Characteristics - Hardware Purchases

Majority of hardware purchase made by the Toronto residents interviewed were made at retail strips. Out-of-city locations showed the only significant competition to the dominance of strips for hardware purchases.

Strips showed outstanding strength among Central Toronto residents, those who spoke a second language at home, and residents aged 30-39 years.

SHARE OF HARDWARE PURCHASES BY SHOPPING AREA*

	BIAs (%)	Major Strips (%)	Yonge/ Y & B (%)	Total Strips (%)	Other City Loc. (%)	Malls in City (%)	Out of City (%)
Total	19	28	13	68	5	7	20
Age							
Under 30	15	25	13	64	6	8	22
30 - 39	21	28	16	77	5	4	14
40 - 59	21	27	13	68	3	8	21
60 and Over	18	36	9	67	4	7	22
Income							
Under $20M	22	26	11	68	6	8	18
20M - 30M	17	27	17	70	4	7	19
30M - 40M	17	28	12	68	6	7	19
Over $40M	17	30	17	72	4	4	20
Speak Second Language	26	29	11	76	5	7	12
Live in Apartment	18	25	19	69	5	9	17
Own House	19	29	10	69	5	5	21
Own a Car	18	27	12	66	6	5	23
Regions							
West	28	15	4	53	14	5	28
West/Central	25	18	12	73	5	7	15
North	9	40	16	69	-	4	28
Central	11	25	35	80	6	10	4
East	20	37	4	73	1	7	19

* Including purchases made outside of designated locations.

Question: ... Think back to the last purchase and tell me the exact location where you made that purchase (hardware or tools).

Customer buying hardware at BIA's tended to have these characteristics:

- o spoke a second language at home
- o lived in the West and West/Central areas of Toronto.

Major strips received higher shares of hardware purchases from:

- o older (60+ years) shoppers
- o residents of North and East Toronto.

Stronger purchase shares of hardware from out-of-city locations were evident among:

- o residents of West and North Toronto
- o car owners.

d) Customer Characteristics - Service Purchases

Retail strips received well over half (69%) of all service purchases made by Toronto residents. Competition for service purchases came from out-of-city shopping areas and other city locations. Both of these areas received significantly lower share of purchases compared to strips. Retail strips had outstanding strength among respondents aged 30 to 39 years and residents of West-Central Toronto.

Services offered in BIA's had better levels of purchases among:

- o those who speak a second language at home
- o residents of West and West/Central Toronto.

SHARE OF SERVICE PURCHASES BY SHOPPING AREA*

	BIAs (%)	Major Strips (%)	Yonge/ Y & B (%)	Total Strips (%)	Other City Loc. (%)	Mall in City (%)	Out of City (%)
Total	14	32	8	69	10	4	17
Age							
Under 30	11	29	9	65	11	6	18
30 - 39	16	32	10	77	9	3	11
40 - 59	17	23	7	71	10	3	16
60 and Over	15	37	5	70	8	3	19
Income							
Under $20M	17	29	8	71	10	5	14
20M - 30M	12	32	9	67	11	4	18
30M - 40M	14	34	6	67	9	5	19
Over $40M	11	34	11	68	11	3	18
Speak a Second Language	24	31	8	74	8	5	13
Live in Apartment	12	32	11	67	14	5	14
Own House	16	32	6	69	7	4	20
Own a Car	15	31	6	69	9	1	21
Regions							
West	23	17	6	60	8	4	28
West/Central	20	24	6	76	6	4	14
North	8	56	5	73	8	3	16
Central	6	25	21	66	24	5	5
East	16	29	5	68	6	4	22

* Including purchases made outside of designated locations.

Question: ... Think back to the last purchase and tell me the exact location where you made that purchase (laundry or dry cleaner and hairdresser or barber or banking services).

Major strips received a greater share of service purchases from:

- older (60+ years) residents
- those with moderate to higher ($30m+) income levels
- residents of North Toronto.

Services located on the Yonge Street and Yonge/Bloor strips and in other city locations had significantly higher shares of purchase from residents of Central Toronto.

Out-of-city locations attracted a higher share of service purchases among residents of West and East Toronto.

e) Customer Characteristics - Clothing Purchases

Retail strips in general were weak in attracting clothing purchases. Most clothing purchases were made in city malls or in out-of-city locations. Yonge Street and Yonge/Bloor area had some strength in share of clothing purchases. City malls tended to attract higher levels of clothing purchases from:

- younger (-30 years) customers
- those with lower (-$20m) incomes
- apartment dwellers
- residents of West/Central and Central Toronto.

Out-of-city locations drew a better share of clothing purchases from:

- those with moderately high ($30m-$40m) incomes
- car owners
- residents of West and North Toronto.

SHARE OF CLOTHING & FOOTWEAR PURCHASES BY SHOPPING AREA*

	BIAs (%)	Major Strips (%)	Yonge/ Y & B (%)	Total Strips (%)	Other City Loc. (%)	Mall in City (%)	Out of City (%)
Total	7	12	13	35	2	40	23
Age							
Under 30	5	11	13	31	2	45	22
30 - 39	7	12	15	34	2	40	24
40 - 59	8	12	13	34	2	38	26
60 and Over	10	14	8	33	-	41	26
Income							
Under $20M	8	13	13	35	2	45	18
20M - 30M	7	11	13	31	2	44	23
30M - 40M	6	11	12	29	1	40	30
Over $40M	3	15	17	36	2	35	27
Speak Second Language	15	17	13	45	2	37	17
Live in Apartment	6	11	17	34	2	45	20
Own House	8	13	11	32	2	39	27
Own a Car	7	12	13	34	2	35	29
Regions							
West	15	5	8	28	2	37	33
West/Central	10	14	11	35	2	46	17
North	2	20	18	40	2	32	28
Central	4	13	22	39	2	52	8
East	5	8	11	24	1	43	31

* Including purchases made outside of designated locations.

Question: ... Think back to the last purchase and tell me the exact location where you made that purchase (clothing or fabrics and footwear).

Yonge Street and Yonge/Bloor strips tended to have greater strength for clothing among:

- those with high ($40m+) incomes
- apartment dwellers
- residents fo North and Central Toronto
- car owners.

Clothing purchases were above the average for BIA's among:

- older (60+ years) residents
- those who speak a second language at home
- residents of West and West/Central Toronto.

Major strips tended to attract:

- car owners
- those who speak a second language at home
- residents of North Toronto.

f) Conclusion

The results of purchase responses indicate that retail strips are important shopping areas for Toronto residents. The purchases which are more likely to be made at strips are for smaller, convenience-type items or services. BIA's and major strips follow this overall trend; however, Yonge Street and Yonge/Bloor area receives more purchases for entertainment purchases (books/records/tapes and entertainment).

Out-of-City locations account for the major competition to retail strips in most purchase categories. City malls show strength in purchase categories where retail strips are weak.

Overall, strips tended to attract more purchases than average from residents aged 30 to 39 years, ethnic shoppers (those who spoke a second language at home), and residents of West/Central and North Toronto. The attraction of strips was weaker among younger (under 30 years) respondents and residents of West Toronto.

There appears to be regional factors affecting the decision to shop at BIA's or major strips. This is probably because more BIA's are located in certain regions (West and West/Central), while there are more major strips in other regions (North).

In general, the strongest competition to strips comes from out-of-city locations. These shopping locations attracted people who lived on the fringes of the city such as residents of West or East Toronto. They also have a greater than average attraction for people who own a car.

City malls were not significant competition to strips where strips were strong, but where strips received lower purchase levels, malls showed strength. This indicates that City of Toronto malls are major competitors to retail strips. They also attract shoppers who have a tendency to not shop at BIA's and major strips (younger (under 30 years) people and residents of Central Toronto). This is evident when looking at clothing/footwear purchases. To a certain extent, this is encouraging because it indicates that where strips are weak, the purchases of residents are not leaving the city; they are going to other shopping areas within Toronto.

2. Frequent Shoppers - Shopping Strips vs Malls

Respondents were asked how often in the past eight weeks they had shopped at the mall and strip which they mentioned. Those who made 9 or more visits in the past eight weeks to a strip or a mall were classified as frequent shoppers. This measurement indicates a level of loyalty to a shopping location, and also gives a rough measurement of the traffic malls and strips might expect.

The level of frequent shoppers, those who made more than 9 visits in the past eight weeks, was significantly higher for shopping strips compared to malls. Almost half of the strip shoppers made frequent trips, while less than one quarter of the mall shoppers were frequent visitors.

Frequent visits to shopping strips were proportionately higher among:

- older (60+ years) shoppers
- those who speak a second language at home
- shoppers with moderately high ($30m-$40m) income levels
- residents of West/Central and North Toronto.

Malls had higher levels of frequent visits from:

- young (under 30 years) respondents
- residents of Central Toronto
- apartment dwellers.

FREQUENT (9+ VISITS) STRIP/MALL SHOPPERS
(% of all Strip/Mall Shoppers)

	Retail Strips		
	1st Mentioned	2nd Mentioned	Mall
Total	47*	15	22
Age			
Under 30	43	16	26
30 - 39	48	15	17
40 - 59	49	11	20
60 and Over	51	17	23
Income			
Under $20M	49	14	23
20M - 30M	42	14	25
30M - 40M	50	18	24
Over $40M	45	16	18
Speak Second Language	55	20	17
Live in Apartment	45	15	26
Own House	48	14	19
Regions			
West	43	12	16
West/Central	50	15	22
North	54	15	22
Central	41	18	29
East	43	13	21

* Read: 47% of those who shopped at a retail strip visited it 9 or more times in the past eight weeks.

Questions:
1. Which <u>one</u> mall with at least one grocery and one department or discount store do you shop most often?
2. Which <u>one</u> retail store strip do you shop most often? By that, I mean a row of stores along a street.
3. At which other retail store strip do you often shop?

(For each Q above: About how many times in the past 8 weeks have you shopped there?)

Respondents were asked if they had shopped a second retail strip. Over one-third (660 respondents) mentioned a second strip. The percent of frequent shoppers to the second strip was considerably below that of the first strip mentioned. The characteristics of the higher level frequent shoppers of second strips were similar to that of the first strip.

This "level of frequent shoppers" measurement indicates the kind of people who are most attracted to a particular shopping location. It is not surprising to note that retail strips tend to attract visits from the same groups who have a tendency to make purchases. They are ethnic shoppers (those who speak a second language at home) and residents of North Toronto. Strips are less likely to attract younger (under 30 years) shoppers and residents of Central Toronto.

Retail strips draw more frequent visits compared to malls from all groups studied. This would suggest that if retail strips chose to make changes that their customers would become aware of them very quickly.

3. Reasons for Not Shopping Retail Strips

A small proportion (11%) of Toronto residents interviewed did not shop at retail strips. These respondents were asked to give their reasons. The following chart shows the reasons cited and the percent of non-strip shoppers naming that reason:

	%
More convenient to shop malls	19
No strip in area	17
Don't like shops	12
Hard to park	11
Strips too expensive	10
Don't shop any one place	9

Convenience is a major reason for not shopping at strips, either because a mall is more convenient or because a strip is not convenient.

4. Shopping Factors

a) Importance of Area Location Factors

Toronto residents were asked to rate, on a scale of one to five, the importance of certain area/location factors in influencing their decision about where to shop. A rating of one meant that the factor was unimportant, while a rating of five meant that it was important. If a respondent felt that a factor was important or somewhat important (ratings of 4 or 5), they were asked to rate the malls or retail strips where they shopped.

Ratings for malls and retail strips were on a scale of one to five. A rating of one meant that the mall or strip was considered poor for the factor, while a rating of five meant that it was excellent.

QUESTIONS FOR AREA LOCATION FACTORS

(4) ASK ALL

"And now I'm about to read a list of factors which might influence your decision for a shopping trip. Please reate each factor on a 1-5 scale.

For each factor please tell me whether you consider it very important by giving it a 4 or 5; or not at all important by giving it a 1 or 2. A score of 3 would indicate the factor is of neutral significance in selecting a destination.

a) The first set of factors which pertain to the area or location itself.

(5) CHECK BACK TO (2) AND (4)/WRITE IN ON CODING SHEET. ASK ALL NAMING MALL IN (2) AND SCORING FACTOR A 4 OR 5 IN Q (4).

"And now I'll read some of the list again. Thinking of _____ (MALL NAMED IN Q (2)), please rate that mall specifically on each factor by giving it a score of 5 for excellence, and 1 for poor. Again 3 would be neutral.

a) The first set of factors pertain to the area of _____ (MALL IN Q (2))

READ FACTORS INDIVIDUALLY AND SCORE. ROTATE FACTORS.

(6) CHECK BACK TO (3) AND (4). ASK ALL NAMING STRIP IN (3) AND SCORING A 4 OR 5 AT Q (4).

"Now I'm about to read some of these factors again. Thinking of _____ (STRIP IN Q (3)), please rate that strip by giving it a score of 5 for excellence, and 1 for poor. Again 3 would be neutral.

a) The first set of factors pertain to the area of _____ (STRIP IN Q (3)

(7) CHECK BACK TO (3D) AND (4). ASK ALL NAMING STRIP IN (3D) AND SCORING FACTOR A 4 OR 5 AT Q (4).

"Now I'm about to read some of these factors again. Thinking of _____ (STRIP IN Q (3D)), please rate that strip by giving it a score of 5 for excellence, and 1 for poor. Again 3 would be neutral.

a) The first set of factors pertain to the area of _____ (STRIP IN Q (3D)

AREA/LOCATION FACTORS

	% Rating Factor Importance(5) in Choosing a Shopping Loc. Q. 4a	% Rating Strip(1) Excellent(5) for Factor Q. 6a	% Rating Strip .2 Excellent(5) for Factor Q. 7a	ating Mall Excellent(5) for Factor Q. 5a
Parking Facilities	31	12	10	58
Selection of Stores	45	25	23	42
Visually Appealing (Benches, Plants, Lighting)	19	26	24	43
Eating and Snacking Facilities	13	29	25	31
Comfortable & Safe	46	56	46	60
Quiet & Peaceful	16	22	20	22
Needed Goods at Right Price	61	20	18	20
Community Activity	6	31	14	16
Convenient Location	36	74	41	39
Accessible by Public Transit	38	76	70	72
Interesting Activities	11	30	29	27
Meeting Place for Neighbours & Friends	9	46	24	32

Questions: See Questions on previous page.

The factors which were considered important (a rating of five) by the highest proportion of respondents were:

- o can purchase the goods I need at the right price
- o feel comfortable and safe at the area
- o has a good selection of stores
- o is accessible by public transit.

Although a majority of shoppers felt that getting needed goods at the right price was important, both malls and retail strips received excellent ratings from a very low proportion of respondents.

Malls received a marginally higher number of excellent ratings for "safe and comfortable" compared to retail strips. In the ratings for "good selection of stores", malls had significantly more excellent ratings than retail strips.

A marginally higher proportion of respondents rated retail strips excellent for "accessibility by public transit". In ratings for "convenient location", retail strips received significantly more excellent ratings than malls.

b) Importance of Store Factors

Respondents were asked to rate the importance of factors pertaining to stores which might influence their shopping. Those rating a factor as important were then asked to evaluate the mall and retail strips where they shopped.

STORE FACTORS

	% Rating Factor Importance(5) in Choosing a Shopping Loca. Q. 4b	% Rating Strip(1) Excellent(5) for Factor Q. 6b	% Rating Strip(2) Excellent(5) for Factor Q. 7b	% Rating Mall Excellent(5) for Factor Q. 5b
Speak Language other than English	2	*	*	*
Friendly Staff	44	33	22	23
Clean and Up-to-Date	47	30	30	54
Look Good - Exterior	17	27	29	54
Informative Advertising	14	17	14	31
Frequent Sales and Specials	28	17	14	29
Open during Evening	32	17	15	63

* Not significant.

Questions:

4.b And now, (RATE) a set of factors which pertain to the stores themselves.

5.b And now, (RATE) the set of factors which pertain to the stores in _____ MALL IN Q (2)

6.b And now, (RATE) the set of factors which pertain to the stores in _____ STRIP IN Q(3)

7.b And now, (RATE) the set of factors which pertain to the stores in _____ STRIP IN Q(3D)

The store factors which received the greatest proportion of "important" ratings were:

- o clean and up-to-date inside
- o have friendly staff
- o open during the evening.

Malls had significantly more excellent ratings than retail strips for having stores which were "clean and up-to-date inside" and "open during the evening".

Retail strips received more excellent ratings than malls for having stores with "friendly staff".

c) Conclusion

Retail strips are considered to be convenient, accessible places to shop with friendly staff in their stores. Strips are perceived as not having store selection and parking facilities comparable to malls. There is also an indication that prices at retail strips are less competitive.

Malls are considered accessible, comfortable and safe, with well-mantained stores and good parking facilities. The malls appear to be lacking in friendliness and as places to find interesting, community activities.

There appears to be some opportunity for strips to promote a friendly neighbourhood image. Retail strips should also attempt to improve their image for store selection and price competitiveness.

B. SUGGESTED FACILITIES AND ENVIRONMENT IMPROVEMENTS

1. Unaided Recommendations

Respondents who rated the "visual appeal" of the strip where they shopped "poor" (see Section A.4) were asked to suggest physical improvements. Approximately 20% of the total sample was asked this question. The chart below shows the recommended improvements.

		%
o	stores need a facelift	29
o	better collection of trash	14
o	planters and flowers	12
o	trees	11

Other improvements which received less mention were "wider sidewalks", "benches", "decorator lights", "attractive signs", "new sidewalk" and "brick sidewalks".

2. Aided Recommendations - Environmental

Respondents who had shopped at retail strips recently and had rated their strip "average to excellent" for "visual appeal" were asked if certain improvements might encourage them to shop more often. Each respondent was allowed up to six responses.

The additions and improvements which were named by higher percentages of respondents were:

- more public washrooms
- more benches
- more rain/weather cover
- more trash containers
- more flowers/trees
- brighter street lights
- bike racks
- decorative street lamps.

Younger (under 30 years) shoppers had higher response rates to all of the suggested improvements. The ones which received the highest degree of mention from this group were:

- more public washrooms
- more trash cans
- more rain/weather cover.

The suggestion of "more public washrooms" also received higher levels of mention from:

- residents who speak a second language at home
- residents of West/Central Toronto.

Respondents who had moderate ($20m-$30m) incomes and residents of West/Central and Central Toronto had a greater tendency to mention "more rain/weather cover" than other groups.

The suggestion of "more flowers and trees" had higher levels of mention among:

IMPROVEMENTS - FACILITIES AND ENVIRONMENT

(% of Respondents Naming Improvement)

	Flowers/ Trees	Public W/C	Benches	Weather Cover	Trash Cans	Parking Lot
Total	31	36	34	31	31	21
Age						
Under 30	36	43	38	39	41	22
30 - 39	34	34	31	33	32	24
40 - 59	27	33	33	25	25	20
60 and Over	17	23	29	20	16	14
Income						
Under $20M	30	39	36	30	32	12
20M - 30M	34	39	36	35	35	24
30M - 40M	31	33	31	34	30	25
Over $40M	32	33	30	29	29	30
Speak Second Language	39	43	36	30	30	16
Live in Apartment	33	35	36	34	31	18
Own House	29	36	32	29	31	23
Frequent Strip Mall Shopper (20+ Trips)	33	39	34	28	36	18
Regions						
West	18	39	32	29	30	24
West/Central	33	40	36	35	39	17
North	34	28	32	30	23	30
Central	32	32	29	30	32	11
East	31	36	35	29	31	19

Question: Would improvements in any of these items encourage you to shop at (Strip mentioned Q(3)) more often?

- the young and middle aged (under 39 years)
- those with moderate ($20m-$30m) incomes
- respondents who speak a second language at home
- residents of North Toronto.

"Parking lot" received proportionately higher levels of mention among:

- those with high ($40m+) family incomes
- residents of North Toronto.

A number of respondents had more than six responses to this question. The additional recommendations were hand tabulated. When these are included with the computer tabulated recommendations, the order of suggestions is as follows:

	%
o more flowers and trees	37
o more public washrooms	36
o more benches	34
o more rain/weather cover	34
o more trash containers	31
o parking lot	30

The proportion of respondents naming a parking lot was considerably higher with these responses included.

ADDITIONAL STORES - UNAIDED MENTION

	% of All Respondents	% of Respondents Under 30 years
Clothing	22	26
Other Retail	22	25
Supermarket	14	11
Specialty Food	8	5
Good Restaurant	8	6

Question: What types of additional stores do you think the (Strip mentioned) area needs?

3. Unaided Recommendations - Stores

Toronto area strip mall shoppers, who rated the strip where they shopped "poor" for "store selection", were asked to name any additional stores needed. A total of 473 suggestions were made. The stores which were named most often were:

- clothing stores
- other retailers
- supermarkets.

Young respondents (under 30 years) had a stronger preference for clothing and other retail stores compared to other groups interviewed. Food retailers received lower levels of mention from these young shoppers.

4. Recommended Alterations to Strips to Encourage Switch from Malls

Respondents who shopped at both retail strips and malls were asked to suggest changes to the retail strip which would encourage them to shop at the strip versus the mall. Those answering the question were allowed any number of replies.

Recommendation which received most mention tended to focus on tenant mix. There were several responses, however, which indicated that for some people, there were changes which would encourage them to shop at a strip rather than a mall. These comments are shown below, with the level of mention received:

	%
o shop wherever	11
o like the area	11
o prefer different location	9

The other changes which would encourage shoppers to visit strips rather than mall were:

- o better variety of stores
- o more clothing stores
- o other kinds of stores
- o more parking spaces
- o supermarket/grocery store.

In general, younger and more affluent residents wanted to see a better variety of stores or more clothing stores. Residents of West Toronto also tended to mention clothing stores.

More parking spaces received above average mention from:

- o respondents with moderate ($30m-$40m) incomes
- o residents of North Toronto.

Supermarket/grocery store was suggested at an above average rate by older (60+ years) respondents.

CHANGES TO STRIPS TO ENCOURAGE MOVE FROM MALL

(% of Respondents)

	Better Variety	Clothing Store	Other Store Type	More Spaces (Parking)	Supermarket Grocery
Total	14	12	9	8	7
Age					
Under 30	16	16	11	7	5
30 - 39	17	16	13	8	6
40 - 59	11	8	6	7	7
60 and Over	6	3	5	7	12
Income					
Under $20M	14	10	8	4	7
20M - 30M	14	13	12	7	7
30M - 40M	14	16	8	11	6
Over $40M	17	13	9	10	7
Region					
West	15	16	8	8	9
West/Central	14	9	11	9	6
North	13	10	10	11	5
Central	13	10	8	2	6
East	14	14	10	6	6

Question: Although indoor malls and local strips do serve different purposes, there are many items which can be purchased at either one. You mentioned you shop at both (mall) and (strip). Generally speaking, are there any changes at (Strip) that could encourage you to shop there versus (mall)?

5. Parking Facilities

a) Importance of Parking Facilities

Parking facilities were considered important by 31% of the respondents (see Section A4). These respondents were asked to rate the malls and retail strips where they shopped. Excellent ratings for malls were almost five times as high as those for retail strips.

Groups which tended to give parking facilities higher levels of important ratings were:

- middle (40-59 years) aged
- higher ($30m+) income groups
- home owners
- car owners
- West and North Toronto residents.

b) Transportation Modes for Shopping Trips

The Toronto residents who rated parking facilities as unimportant were asked what methods of transportation they used on shopping trips. Transportation modes which received highest levels of mention were:

- always/usually transit or taxi
- usually walk and sometimes drive/usually walk, sometimes transit or taxi.

	% of Respondents Rating Parking Facilities Impt.	% of Respondents Using Form of Transportation for Shopping Trip*			
		Always/ Usually Drive	Always/ Usually TTC/Taxi	Walk/ Bike	Walk/ TTC/ Drive
AGE					
Under 30	25	8	52	7	33
30-39	29	13	39	6	42
40-59	39	10	39	6	44
60 and Over	37	6	49	8	35
INCOME					
Under $20M	22	4	49	6	41
20M - 30M	32	9	48	8	35
30M - 40M	37	13	43	9	35
Over $40M	37	16	36	8	40
SPEAK SECOND LANGUAGE	34	15	30	10	46
OWN HOUSE	37	12	46	6	35
LIVE IN APT.	24	5	47	8	39
REGIONS					
West	37	19	48	2	30
West/Cent.	27	8	45	8	38
North	39	7	49	6	36
Central	16	3	40	11	46
East	34	10	54	5	30
OWN AUTO	42	19	36	7	37
FREQUENT STRIP MALL SHOPPERS		10	40	8	42

*QUESTION: What method of transportation do you use on shopping trips?

Respondents who were more likely to take public transit or taxis to go shopping were:

- o younger (under 30 years)
- o lower income (under $20m)
- o residents of East Toronto.

Transportation methods combining walking, driving, transit and taxis were mentioned proportionately more by:

- o middle (40-50 years) age group
- o those who speak a second language at home
- o residents of Central Toronto.

c) Parking Facilities at Strips

Retail strip shoppers who rated the parking facilities at their retail strips as poor were asked what they found difficult about the area's parking spaces. Over half of the respondents said that there was not enough space.

These shoppers were then asked if they would do more shopping at the retail strips if the city built a new parking lot and charged 25¢ an hour. The majority felt that they would shop more.

6. Conclusion

In analyzing the kinds of environmental improvements which are needed in strips, it is important to note that where strips are rated poor for "visual appeal", it appears to relate to the stores themselves rather than the strip. Stores should be improving their own

WHERE STRIPS WERE RATED POOR FOR PARKING FACILITIES

	% Mentions Strip 1	% Mentions Strip 2 [1]
Too Expensive	12	13
Parallel Parking	3	3
Lot Too Far Away	5	9
Not Enough Space	55	55

CITY BUILT PARKING @ .25/HR.

	% of Respondents	% of Respondents
Shop More [2]	57	76

Questions:

1. What in particular do you find difficult about (strip) area's parking spaces?

2. If the city were to build a new parking lot in the area, and charge .25 cents an hour for parking, do you think you would do more shopping there?

interiors and exteriors, as well as improving the surrounding area. Although amenities such as flowers/trees, benches and weather cover are important, residents are also concerned about basic services such as trash containers and collection.

Store selection appears to be a concern for Toronto retail strips. Changes to strips which would make them more competitive with malls are focussed on tenant mix A better variety of stores, in general, and clothing stores particularly, are suggested by Toronto residents as important alterations to strips. An emphasis on clothing stores would appeal to younger and more affluent shoppers. Supermarket/grocery stores would appeal to older customers.

Parking is a concern for some Toronto residents. In general, strips are not competitive with malls. When parking facilities are poorly rated, the major reason is because there is not enough space. A parking lot is considered an important physical improvement as well as an alteration that would make strips more competitive with malls. This varies from strip to strip.

These facilities and environmental improvements tend to vary in emphasis by geographic region.

Residents of West Toronto put more emphasis on public washrooms. They are also more likely to drive when they shop, and so it is not surprising that they consider parking facilities important. They put more emphasis on parking lots as needed improvements. West Toronto residents tend to suggest that more clothing stores would make their strips more competitive with malls.

Residents of West/Central Toronto tend, more than residents of other areas, to feel that their strips could use physical improvement. They tend to place emphasis on public washrooms, trash containers, and more rain/weather cover. These residents place less emphasis on store selection or on parking facilities.

North Toronto residents place more emphasis on parking facilities, although they do not necessarily drive when they shop. They consider parking lots as important physical improvements, and think that more parking spaces would make their strips more competitive with malls. They are also more likely to suggest that flowers and trees would attract more shopping visits.

Residents of Central Toronto place less emphasis on physical improvements than other residents. They would like to see more trash cans and more flowers and trees. They feel that a better variety of stores would make their strips more competitive. There is a notable lack of emphasis on parking facilities among these residents. This is not surprising since few use cars when they go shopping.

East Toronto residents do not mention physical improvements at the same rate as other residents. They tend to place some emphasis on benches and more public washrooms. They place less emphasis on parking facilities, but feel that more clothing stores would make their strips more competitive with malls.

C. SPECIAL STUDY ON PARTICULAR RETAIL STRIPS

Two retail strips, Dundas/Keele and Bloor/Jane, have been chosen for more in-depth study. The market area for each strip was defined by analyzing the purchases of respondents and the strips where they shopped. Tracts where these residents tended to shop at a particular strip were included in the market area for that strip.

1. Dundas/Keele

a) Population Characteristics

The trade area for Dundas/Keele has a population of 122,335, with 42,330 households. The number of persons per household is 2.89, which is higher than the city average. Dundas/Keele has proportionately fewer single person households and more multiple person households compared to the city. The population has a strong ethnic component with a higher than average concentration of Italian, Ukrainian, Polish and German residents. The income per household in this area is slightly lower than the average for the city.

b) Purchases by Type of Shopping Area

Retail strips are important shopping locations for Dundas/Keele residents. The strongest competition to retail strips in this area comes from out-of-city locations. Total strips tend to take a lower share of purchases in most commodity groups compared to the total sample, while out-of-city locations take a higher share of purchase compared to the total.

CHARACTERISTICS OF TRADE AREA POPULATION
(1981 Census)

	Dundas/Keele	City of Toronto
Population Size	122,335	765,536
No. Households	42,330	304,255
P.P. Household	2.89	2.5
Average Household Income	$23,879	$25,393
% Population 65 yrs +	11.0%	12.7%
19 yrs -	23.3	23.7
% Population with Mother Tongue English	49.8%	62.7%
Major Ethnic Groups		
% Italian	11.4%	7.6%
Ukranian	4.8	
Polish	4.6	1.6
German	2.3	1.6
Greek	1.7	2.4
Miscellaneous	25.4	
Household Size		
% 1 person	27.5%	35.1%
2 persons	28.4	28.1
3 persons	16.1	13.4
4+ persons	27.3	23.2

Share of purchases made at BIA's by Dundas/Keele residents was higher than share of purchase of BIA's in the total sample.

BIA purchase shares showed above average strengths in:

- health/beauty products
- hardware
- laundry/dry cleaning
- entertainment.

Malls in the city had significantly higher levels of purchases compared to BIA's for:

- clothing or fabrics
- pots, pans, dishes and ornaments, etc.

Out-of-city locations captured the highest share of purchases for:

- main grocery shopping
- furniture.

c) Area/Location/Store Factors - Strips vs Malls

When Dundas/Keele residents were asked to rate the importance of certain area/store factors, they tended to place emphasis on:

- can purchase goods I need at the right price
- selection of stores
- comfortable and safe.

SHARE OF PURCHASES BY SHOPPING AREA: DUNDAS/KEELE (D/K)

	BIA'S (%)		Other Major Strips (%)	Yonge/ Y & B (%)	Total Strips (%)		Other City Loc. (%)	Malls in City (%)	Out of City (%)	
	D/K	Total			D/K	Total			D/K	Total
Main Grocery Shopping	25	11	6	-	41	46	11	6	42	23
Convenience Food	27	15	6	-	55	67	13	-	32	18
Clothing/Fabric	16	6	3	5	27	33	1	41	31	23
Footwear	17	8	5	8	33	37	2	33	32	23
Hardware	31	19	10	4	52	68	16	4	28	20
Furniture	8	5	5	5	24	39	7	23	46	34
Utensils	12	5	8	8	34	34	1	35	30	21
Books/Records/Tapes	16	4	10	30	59	61	2	20	19	15
Health/Beauty Prod.	36	14	8	3	52	52	7	14	27	18
Laundry/Dry Cleaners	31	16	16	2	68	74	7	-	25	16
Hairdresser/Barber	19	11	19	6	57	68	7	9	27	19
Restaurant Meal	13	9	17	11	52	60	9	5	34	21
Snack	27	12	9	5	49	62	6	8	37	19
Entertainment	31	9	9	16	64	66	16	6	14	12
Banking Services	30	16	12	9	61	65	10	2	27	17

They placed more emphasis on needed goods at right price and less emphasis on the store factors. Respondents from this market area were then asked to rate the strips and malls where they shopped against each factor which they had felt was important.

Dundas/Keele residents tended to rate strips higher, compared to the total sample, for area factors and lower for location and store factors. Rating for "comfortable and safe", "visually appealing" and "friendly staff" in this area were much higher compared to the city. Rating for "convenient location", "accessible to public transit" and stores - "clean and up-to-date" all received lower excellent ratings compared to the total.

The residents of the Dundas/Keele market area were asked to rate the mall where they shopped for the area/location/store factors. In general, the mall received lower ratings from these respondents, compared to the total of all respondents. Only "store selection" and "visually appealing" received better ratings. Malls shopped by these residents received notably lower rating for "convenient location" and "accessible by public transit" compared to the total.

d) Frequency of Shopping Visits - Strips vs. Malls

Dundas/Keele residents were asked how often they visited the retail strips and malls where they shopped. The percent of residents making frequent trips (9+ in 8 weeks) to retail strips was more than double those making frequent trips to malls. When compared to the total city, Dundas/Keele residents were less likely to be frequent shoppers at either malls or strips.

DUNDAS/KEELE

	% Rating Factor Important (5) in Choosing a Shopping Loc. Q. 4a/b		% Rating Mall Excellent (5) for Factor Q. 5a/b		% Rating Strip Excellent (5) for Factor Q. 6a/b	
	Dundas/ Keele Res.	Total	Dundas/ Keele Res.	Total	Dundas/ Keele Res.	Total
Area/Location Factors						
Parking Facilities	32	31	57	58	13	12
Selection of Stores	46	45	44	42	29	25
Visually Appealing (benches, plants, lighting)	21	19	47	43	40	26
Comfortable and Safe	44	46	60	60	64	56
Quiet and Peaceful	18	16	-	-	-	-
Needed Goods at Right Price	63	61	20	20	23	20
Convenient Location	24	36	26	39	69	74
Accessible by Public Transit	32	38	60	72	71	76
Store Factors						
Friendly Staff	40	44	21	23	37	33
Clean and Up-to-Date	44	47	53	54	23	30
Exterior Looks Good	16	17	51	54	23	27
Informative Advertising	9	14	-	-	-	-
Frequent Sales & Specials	23	28	27	29	12	17
Open During Evening	31	32	62	63	7	17

- Not enough responses to analyze.

DUNDAS/KEELE MARKET AREA

FREQUENT (9+ VISITS) MALL/STRIP SHOPPERS (% OF ALL MALL/STRIP SHOPPERS)

MALL		STRIP 1		STRIP 2	
Dundas/Keele Res.	Total	Dundas/Keele Res.	Total	Dundas/Keele Res.	Total
16	22	43	47	14	15

IMPROVEMENTS TO ENCOURAGE SHOPPING - AIDED

	Dundas/Keele Res. %	Total %
More Public Washrooms	48	36
More Benches	38	34
Weather Cover	37	34
More Trash Cans	37	31
Parking Lot	30	30

CHANGES TO STRIPS TO ENCOURAGE MOVE FROM MALL

	Dundas/Keele Res. %	Total %
Clothing Store	19	12
Better Variety	15	14
Like Area	13	11

e) Recommended Changes for Facilities and Environment

Dundas/Keele strip shoppers were asked if certain changes to the facilities of a strip would encourage them to shop more. Almost half (48%) of the residents suggested "more public washrooms", which was considerably more than the proportion of the total sample listing this improvement. Other facilities which received higher than average responses were:

- more benches
- more rain/weather cover
- more trash cans.

The residents were also asked what changes to the strip where they currently shop would encourage them to switch from the mall which they shopped. A "clothing store" was suggested by a greater proportion of Dundas/Keele shoppers than by the total city.

f) Conclusion

The Dundas/Keele area has a relatively high proportion of ethnic groups. This means that its market is predisposed to shopping at retail strips. The retail strips, however, receive very strong competition from shopping area located outside the city. Most of these areas are malls.

There is some indication that residents find malls more visually appealing, well maintained with a better store selection than strips. More clothing stores or a better variety of stores would also help strips appeal to the Dundas/Keele market area residents.

TRADE AREA FOR THE BLOOR / JANE STRIP

CITY OF TORONTO PLANNING AND DEVELOPMENT DEPARTMENT
STEPHEN G. McLAUGHLIN - COMMISSIONER

332/06085

The physical improvement which would appeal most to shoppers in this area is more public washrooms. More benches and rain covers would also appeal to these people.

In general, Dundas/Keele residents feel that their shopping strips are visually appealing and well maintained; however, the stores in the strips are not as clean and well maintained.

2. Bloor/Jane Area

a) Population Characteristics

The trade area for Bloor/Jane has a population of 124,255, with 45,370 households. The number of persons per household is 2.74, which is higher than the city average of 2.5. The Bloor/Jane area has proportionately fewer one person households and more two and three person households than the city average. The population has a higher proportion of ethnic groups when compared to the total city, but somewhat lower than the Dundas/Keele market area. The ethnic groups with disproportionate representation are Ukrainian, Polish and German. The income per household is slightly less than the average for the city.

b) Purchases by Type of Shopping Area

The distribution of the purchases of Bloor/Jane residents is similar to the distribution of purchases of all respondents. For commodities where strips are not as strong, out-of-city locations tend to have higher than average purchase share. Commodities such as furniture and footwear are examples of this trend.

CHARACTERISTICS OF TRADE AREA POPULATION
(1981 Census)

	Bloor/Jane	City of Toronto
Population Size	124,255	765,536
No. Households	45,370	304,255
P.P. Household	2.74	2.5
Average Household Income	$24,029	$25,393
% Population 65 yrs +	12.2%	12.7
19 yrs -	21.2%	23.7
% Population with Mother Tongue English	55.5%	62.7
Major Ethnic Groups		
% Italian	3.6%	7.6%
Ukranian	5.9	-
Polish	5.4	1.6
German	2.6	1.6
Greek	1.6	2.4
Miscellaneous	25.4	-
Hourshold size		
% 1 person	28.5%	35.1
2 persons	31.2	28.1
3 persons	16.0	13.4
4+ persons	23.5	23.2

The share of purchases made at BIA's by Bloor/Jane residents was significantly greater than that registered for BIA's from all Toronto residents. The products more likely to be bought in BIA's shopped by Bloor/Jane residents were:

- o health and beauty products
- o hardware
- o laundry/dry cleaners
- o main grocery shopping.

The malls in Toronto and out-of-city locations were the BIA's strongest competitors. The Toronto malls had highest levels of purchases for such products as:

- o clothing
- o footwear
- o pots, pans, dishes, ornaments, etc.

The out of city locations had an outstanding share of purchases for furniture.

c) Area/Location/Store Factors - Strips vs Malls

Bloor/Jane area residents were asked to rate the importance of various factors in choosing a shopping location. When their responses are compared to those of the total sample, they appear to put proportionately more emphasis on parking facilities and less on convenient location and accessibility by public transit.

The factors which were considered important by the highest percentage of respondents were:

- o can purchase goods I need at the right price
- o has a good selection of stores
- o feel comfortable and safe at the area
- o stores are clean and up-to-date inside.

SHARE OF PURCHASES BY SHOPPING AREA: BLOOR/JANE

	BIA'S (%)		Other Major Strips (%)	Yonge/ Y & B (%)	Total Strips (%)		Other City Loc. (%)	Malls in City (%)	Out of City (%)	
	B/J	Total			B/J	Total			B/J	Total
Main Grocery Shopping	31	11	10	1	49	46	10	18	23	23
Convenience Food	27	15	12	-	70	67	15	5	10	18
Clothing/Fabric	15	6	5	9	31	33	2	43	24	23
Footwear	16	8	4	12	32	37	4	39	25	23
Hardware	37	19	18	5	66	68	13	4	17	20
Furniture	8	5	5	6	23	30	5	29	43	34
Utensils	14	5	8	10	36	34	-	37	27	21
Books/Records/Tapes	15	14	11	34	62	61	3	20	15	15
Health/Beauty Prod.	38	16	11	3	58	52	8	22	12	18
Laundry/Dry Cleaners	34	11	14	3	77	74	11	3	9	16
Hairdresser/Barber	19	11	17	9	62	68	9	8	21	19
Restaurant Meal	10	9	18	15	62	60	11	4	23	21
Snack	29	12	10	7	60	62	11	8	21	19
Entertainment	27	9	12	20	66	66	20	4	10	12
Banking Services	32	16	15	13	69	65	10	3	18	17

Retail strips received better than average "excellent" ratings and were more highly rated than malls for:

- o accessible by public transit
- o location is nearby
- o feel comfortable and safe at the area.

Although the visual appeal of retail strips had more excellent ratings from Bloor/Jane residents compared to all respondents, the ratings for the exterior of the stores in strips was lower.

Overall, malls received fewer excellent ratings from Bloor/Jane residents compared to all respondents. They received their highest excellent ratings for:

- o open during the evening
- o accessible by public transit
- o comfortable and safe.

d) Frequency of Shopping Visits - Strips vs Malls

Respondents who lived in the Bloor/Jane area were asked how often they shopped at the retail strip and mall which they had mentioned. They were three times more likely to be frequent (9+ visits in 8 weeks) strip mall shoppers compared to mall shoppers. Proportionately fewer residents in this area were mall shoppers when compared to all respondents.

BLOOR/JANE

Area/Location Factors	% Rating Factor Important in Choosing a Shopping Loc. Q. 4a/b		% Rating Mall Excellent for Factor Q. 5a/b		% Rating Strip Excellent for Factor Q. 6a/b	
	B/J Res.	Total	B/J Res.	Total	B/J Res.	Total
Parking Facilities	37	31	58	58	11	12
Selection of Stores	45	45	41	42	27	25
Visually Appealing (benches, plants, lighting)	18	19	46	43	30	26
Eating and Snacking Facilities	11	13	-		-	
Comfortable and Safe	43	46	52	60	55	56
Quiet and Peaceful	19	16	-		-	
Needed Goods at Right Prices	60	61	26	20	21	20
Convenient Location	28	36	24	39	67	74
Accessible by Public Transit	31	38	54	72	68	76
Store Factors						
Friendly Staff	41	44	20	23	31	33
Clean and Up-to-Date	48	47	47	54	29	30
Exterior Looks Good	16	17	55	54	20	27
Informative Advertising	12	14	22	31	-	
Frequent Sales & Specials	27	28	26	29	16	17
Open During Evening	30	32	66	63	8	17

- Not enough responses to analyze.

e) Recommended Changes - Facilities and Environment

Bloor/Jane residents were asked to suggest improvements which would encourage them to shop more often at retail strips. These respondents placed proportionately more emphasis compared to all respondents on:

- more public washrooms
- bike racks
- parking lot

The change to their retail strip which would encourage almost a quarter (24%) of the Bloor/Jane residents to shop strips versus malls was the inclusion of a clothing store. These respondents put proportionately greater emphasis on clothing stores than all respondents.

f) Conclusion

The retail strips in the Bloor/Jane area appear to have a relatively strong franchise with the area residents. The share of purchases made at strips is high. The main competition comes from city malls and out-of-city locations, which also tend to be malls. Although malls are used by Bloor/Jane residents, their evaluation of the malls which they shop tends to be relatively critical. In general, area factors of strips, except parking facilities appear to be reasonably competitive with malls. Store factors, especially the exterior appearance of stores and evening store opening, are considerably less competitive for strips compared to malls.

Bloor/Jane residents placed less emphasis on the accessibility of shopping areas which suggests that they use other forms of transportation when shopping. This could account for the relatively stronger need for bike racks and parking lots. Consistent with this, the parking facilities of strips received very low ratings.

Any program for improvement in this strip should stress parking facilities. The physical appearance of the actual stores could use some improvement as well. The addition of clothing stores would increase the Bloor/Jane strip's ability to compete with malls.

BLOOR/JANE

FREQUENT (9+ VISITS) MALL/STRIP SHOPPERS
(2% OF ALL MALL/STRIP SHOPPERS)

MALL		STRIP 1		STRIP 2	
B/J Res.	Total	B/J Res.	Total	B/J Res.	Total
15	22	47	47	8	15

IMPROVEMENTS TO ENCOURAGE MORE SHOPPING - AIDED

	B/J Res. %	Total
More Public Washrooms	46	36
More Benches	38	34
Bike Racks	35	23
Weather Cover	34	34
More Trash Cans	32	31
Parking Lot	29	21

CHANGES TO STRIPS TO ENCOURAGE MOVE FROM MALL

	B/J Res. %	Total
Clothing Store	24	12
Prefer Different Location	15	11
Shop Wherever	13	11

APPENDIX I

RETAIL SHOPPING LOCATIONS

A. BUSINESS IMPROVEMENT AREAS

Dundas/Keele	St John's Rd. to Indian Grove
Bloor/Jane	S. Kingsway to Glendonwynne
St. Clair/Dufferin	Lansdowne to Northcliffe
St. Clair/Christie	Christie to Oakwood
Bloor/Lansdowne to Dufferin	
Bloor/Dufferin to Christie Pits	
Queen/Lansdowne	Roncesvalles to Dufferin
Spadina/Coulsen (Forest Hill Village)	
Parliament/Carlton	Prospect to Gerrard
Danforth/Pape	Logan to Jones
Gerrard/Coxwell	Coxwell to Woodfield
Queen/Broadview	W. of Broadview to Tracks
Queen/Lee (Beaches)	Kippendavie to Wineva
Eglinton/Bathurst	Bathurst to City Limits

B. OTHER MAJOR DISTRICT STRIPS

Jane/Annette	
St. Clair/Bathurst	Christie to Bathurst & Vaughan
Roncesvalles	
Yonge/St. Clair	Heath to Rosehill and E. on St. Clair
Yorkville & Cumberland	
Bloor/St. George	Spadina to Avenue Rd.
Bloor/Bathurst	Palmerston to Spadina; S. on Markham and Bathurst to Lennox
Yonge/Wellesley	Charles to College
Kensington Market	
Spadina	College to Front
Queen/Bathurst	Markham to Spadina
Queen/John	Spadina to Simcoe
Church/Wellesley	Alexander to Gloucester
Danforth/Broadview to Logan	
Danforth/Coxwell	Monarch Pk. to Woodmount
Danforth/Woodbine	Woodmount to Patricia
Danforth/Main	Patricia to Barrington
Danforth/Dawes	Barrington to Luttrell
Queen/Tracks to Leslie	
Kingston Rd./Victoria Park	
Eglinton/Avenue Rd.	
Yonge/Lawrence	Lawrence to Old Orchard Park
Yonge/Roehampton to Blythwood	
Eglinton/Yonge	Park to Mt. Pleasant
Yonge/Eglinton to Davisville	
Mt. Pleasant	
Bayview/Eglinton	
Bayview, S. of Eglinton	Hillsdale to Manor Rd.

C. YONGE ST. STRIP/YONGE & BLOOR AREA

Yonge/Bloor/Avenue Rd.	Ramsden Pk. to Charles, Avenue Road to Church
Yonge Downtown	College to Front

D. TOTAL STRIPS

All BIA's	
All other major strips	
Yonge Street strip/Yonge & Bloor area	
Dundas/Runnymede	Runnymede to St. John's Road
Dundas/Humberside	Indian Grove to Bloor
Annette/Runnymede	
Bloor/Keele	Keele to Dundas
St. Clair/Old Weston Road	Old Weston Road/Laughton
St. Clair/Oakwood	Oakwood to Northcliffe
Davenport/Laughton	
Davenport/Dufferin	
Davenport/Dovercourt	Ossington to Dovercourt
Dupont/Symington	Between the Tracks
Wallace/Emerson	
Dovercourt/Hallam	
Christie/Dupont	
Dundas/Bloor to Sorauren	
King/Dufferin	
Harbord/Ossington	
College/Grade	Crawford to Euclid
College/Ossington	Shaw to Gladstone
College/Dufferin	
Dundas/Lansdowne to Dufferin	
Dundas/Dufferin to Ossington	
Dundas/Grace to Bathurst	
Ossington/Dundas to Queen	
Queen/Ossington	Gladstone to Bellwoods Park
Bathurst/Bloor to Dupont	
Dupont/Davenport	Spadina to East of Bedofrd
Yonge/Summerhill	Rosehill to Tracks
Yonge/Roehampton	Tracks to Ramsden Park
Avenue Road/Davenport	

Bloor/Clinton	Willowvale Park to Palmerston
Harbord/Clinton	
Harbord/Bathurst to Spadina	
College/Bathurst	Palmerston to Bathurst; College to Dundas
College/Bathurst to Major	
College/Spadina	Major to McCaul
Baldwin/McCaul	
Dundas/University to Spadina	
Dundas/Bathurst to Spadina	
Queen/Euclid	Bellwoods to Markham
King/John	Spadina to Simcoe
Church/Dundas to south of Queen	
Queen/Church to Parliament	
St. Lawrence Area	King, Front, Esplanade/ Church to Sherbourne
Parliament/Dundas	Dundas to Queen
Dundas/Church to Parliament	
Broadview/Danforth to Fulton	
Danforth/Greenwood	Jones to Monarch Park
Gerrard/Main	
Gerrard/Woodbine	
Gerrard/Fairford (Gerrard north)	
Gerrard/Greenwood	Greenwood to Woodfield
Gerrard/Pape to Jones	
Gerrard/Carlaw to Logan	
Gerrard/Broadview	
Broadview/Dundas	
Queen/Leslie to Kingston Road	
Coxwell/Gerrard to Queen	
Kingston Road/Woodbine	
Kingston Road/Waverley	
Kingston Road/Main	
Queen/Glenmanor to Beech	
Queen/Neville Park to Wineva (excl. District 94)	

Queen/Woodbine	Woodfield to Kippendavie
Yonge/Blythwood to Lawrence	
Merton Street	
Bloor/Sherbourne	Church to Sherbourne

E. MALLS IN THE CITY

Galleria Plaza	Dufferin/Dupont
Food City	Dupont/Christie
Eaton Centre & Simpsons	
Hudson Bay Centre	2 Bloor Street East
Manulife Centre	55 Bloor Street West
Yonge/Eglinton Centre	N.W. corner of Yonge & Eglinton
Riverdale S.C.	Carlaw/Gerrard
Gerrard Square	Pape/Gerrard
Crossways	Bloor/Dundas
Loblaws/Towers	Bloor/Dundas
Dufferin Mall	Bloor/Dufferin

F. OTHER CITY LOCATIONS

Westclair Plaza	St. Clair/Runnymede
Darrigos	Old Weston Road/St. Clair
Canadian Tire	Keele/Dundas
Swansea Shopping Centre	South Hill Drive
IGA Plaza	Dupont/Symington
Stuarts	Dufferin/Dupont
Darrigos	Essex/Shaw
Knob Hill Farms	Dundas/Lansdowne
College Square	College/Crawford
Kinhurst Plaza	King/Jameson
Colonia Plaza	N.E. corner Yonge & St. Clair
Towne Mall	St. Clair/East of Yonge
Harbourfront	Queen's Quay/York
555 Sherbourne	Sherbourne/Isabella
St. Jamestown	Wellesley/Parliament
Dominion	Sherbourne/Dundas
St. Lawrence Market	King/Jarvis
Regent Park	
Knob Hill Farms	Cherry/Polsen
Blake St. Plaza	
Loblaws Superstore	Leslie & Eastern
Downtown Locations not otherwise coded	Boundaries: College, University, Victoria, Lake
City Locations not otherwise coded	

G. OUT-OF-CITY LOCATIONS

Shoppers' World	Danforth/Victoria Park
Humbertown Plaza	Royal York/Dundas
Stonegate Plaza	BerryRoad/Stephen Drive
Sherway Gardens	QEW/Highway 427
Safeway Plaza	Dundas/Runnymede
Westside Mall	Eglinton/Caledonia
Yorkdale S.C.	Dufferin/401
Danforth/Warden S.C.	Danforth/Warden
Warden Woods	Warden/St. Clair
Eglinton Square	Victoria Park/Eglinton
Golden Mile Plaza	Victoria Park/Eglinton
Scarborough T.C.	McCowan/401
Bayview Village	Bayview/Sheppard
Thorncliffe Park	Thorncliffe Park/Overlea
Fairview Mall	Don Mills/Sheppard
Lawrence Plaza	Bathurst/Lawrence
York Mills S.C.	York Mills/Bayview
Out-of-CityLocations not otherwise coded	

APPENDIX II

ANALYSIS OF SAMPLE

1. GEOGRAPHIC DISTRIBUTION

Regions	Households No.	%	Respondents No.	%
1	44,105	14.5	332	18.2
2	85,750	28.2	344	18.8
3	67,045	22.0	419 419	22.9
4	45,505	15.0	328	18.0
5	61,850	20.3	403	22.1
Total	304,255	100%	1,826	100%

- Under-represented in Region 2 - slightly over in the other areas.

	Population	Sample
2. AVERAGE HOUSEHOLD SIZE	2.5 pph	2.6 pph
% 1 person	35.1	22.1
% 2 person	28.1	36.3
% 3 person	13.4	17.4
% 4 person	18.0	19.7
% 6+ person	5.2	4.6

- Under-represented singles a lot, and over-represented 2 person and to a lesser extent 3 person households.

3. AVERAGE CHILDREN PER HOUSEHOLD (under 19 years)	0.596	0.500
% 0 children	64.2	69.8
% 1 child	15.8	14.3
% 2 children	12.4	10.7
% 3-4 children	8.2	4.8
% 5+ children	0.8	0.4

- Slightly fewer children. More households with no children, and fewer large (3+ children) families.

		Population	Sample
4.	AVERAGE SENIORS PER HOUSEHOLD (65+)	0.32	0.21
5.	AVERAGE HOUSEHOLD INCOME (MEAN)	$25,393(1980)	$28,716
	" PER CAPITA "	10,157	11,045

1983 dollars = 117.2/88.9 1980 dollars

Population averages inflated to 1983 dollars = $33,476 and $13,390

∴ the sample is about 15% less than the population average.

6. LANGUAGE

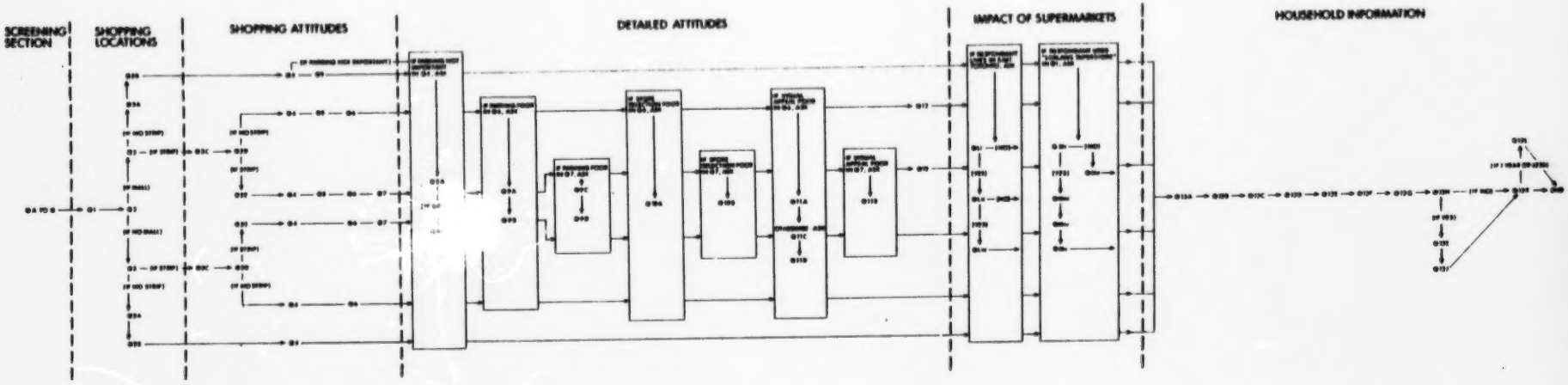
	Pop'n Mother Tongue % of Pop'n		Sample Languages Spoken % Sample
English	62.7	(only English	74.8
Italian	7.6		4.1
Greek	2.4		1.1
Portuguese	6.9		1.1
Chinese	3.9		1.4
Other	16.5		24.1

- Under-represented ethnic population, especially when you consider that our question was more casually worded than the census' mother tongue question. 68.8 of sample named 2 languages. Region '2' has the highest concentration of "ethnics". The higher refusal rate we got may explain that Region's under-representation.

SUMMARY

Sample is slightly skewed to the extent that it under-represents i) single person households, and ii) the ethnic population. We should be wary of possible impact when interpreting results.

OUTLINE OF QUESTIONNAIRE



332/06085

CITY OF TORONTO PLANNING AND DEVELOPMENT DEPARTMENT
STEPHEN G. McLAUGHLIN - COMMISSIONER

1 2 3 4

5

6 7 8 9 10 11 1

13 14 15 16 17

Toronto Shopping Behaviour and Attitudes Questionnaire

EAST VERSION: Exchanges 46, 69

NOTE: PRIOR TO DIALING CHECK ZONE QUOTAS

OFFICE ONLY (INTERVIEWERS DO NOT WRITE HERE):

Census Tract No.	_____	Callback	_____
Zone No.	_____	Respondent Name	_____
Phone Exchange	_____	Interviewer	_____
		Date	_____
Cross Streets	_____	Mall	_____
		Strip (A)	_____
Special Notes	_____	Strip (B)	_____
_____		QL	
_____		QM	

18 19 20 21 22

23 24

25 26

INTRODUCTION

"Hello, I'm _____ from John C. Williams Consultants Ltd., a market survey company. We are conducting an opinion poll on shopping habits. May I speak to the man or woman of the house who does most of the household shopping?"

SCREENING SECTION

REPEAT INTRODUCTION IF NECESSARY

(A)	RESPONDENT IS	Male	1
		Female	2

27

(B) ASK ALL

"Since I have quotas to fill, please tell me into which of these age groups I should check you."

READ

Under 30	1
30-39	2
40-49	3
50-59	4
60-65	5
66 and over	6
DNS	R

28

(C) ASK RESPONDENTS HAVING TROUBLE SPEAKING ENGLISH.

"Would you prefer to speak in English, or another language?"

English	1	(GO TO (D))
Other	2	(TAKE NAME AND PREFERRED LANGUAGE. ASK FOR CALL BACK TIME. CHECK WITH SUPERVISOR.)

(D) ASK ALL

"I'm about to describe a geographic area inside Toronto. Please tell me whether you live within the boundaries. The area is bounded:

To the north by Eglinton
To the east by Warden
To the west by the Mimico Creek, and
To the south by the Lake?"

Live inside	1	GO TO (Di)
Live outside	2	GO TO (E). ASK FOR CALLBACK
Don't Know	R	TIME. CHECK WITH SUPERVISOR.

(Di) "Are you <u>west</u> or <u>east</u> of the Don River?"

West	1	GO TO (E)
East	2	GO TO (Dii)
Don't Know/DNS	R	GO TO (E). ASK FOR CALL BACK TIME. CHECK WITH SUPERVISOR.

(Dii) "Are you <u>north</u> or <u>south</u> of St. Clair Avenue?"

North	1	TERMINATE
South	2	GO TO (E)
Don't Know	R	GO TO (E). ASK FOR CALL BACK TIME. CHECK WITH SUPERVISOR.

NOTE: CHECK (Dii). IF 2 CIRCLED, GO TO (E) SERIES AND GO THROUGH QUESTIONNAIRE. CHECK (D) (Di), (Dii). IF R CIRCLED, GO TO (E) SERIES, AND ASK FOR CALL BACK TIME. CHECK WITH SUPERVISOR.

(E) ASK ALL

"And can you tell me please the nearest major cross-streets to your residence?"

WRITE NAME: _____

(Ei) ASK ALL (SLOWLY)

"Is your residence to the north east, north west, south east or south west of that intersection?"

North East	1
North West	2
South East	3
South West	4
Other (Describe)	_____
	_____
	_____
Don't know	R

(1) ASK ALL

"Now I'm about to list a number of items and services you might purchase from time to time. I'll read them one at a time.

For each one, I'd like you to think back to your last purchase and tell me the exact location where you made the purchase. By location, I mean the name of a plaza, mall, city area or cross-streets the store is located at?"

CHECK MASTER MAP/CODE NUMBER IN LOCATION COLUMN

ITEM/SERVICE	LOCATION WRITE NUMBER AND NAME	
Main grocery shopping	_____	29 30 31
Convenience Food	_____	32 33 34
Clothing or fabric	_____	35 36 37
Footwear	_____	38 39 40
Hardware or tools	_____	41 42 43
Furniture/Appliances (incl. electronic equip.)	_____	44 45 46
Pots, pans, dishes, ornaments	_____	47 48 49
Books, records, tapes	_____	50 51 52
Health or beauty products	_____	53 54 55
Laundry or dry cleaner	_____	56 57 58
Hairdresser or barber	_____	59 60 61
A restaurant meal	_____	62 63 64
A snack	_____	65 66 67
Entertainment (a movie or other)	_____	68 69 70
Banking services	_____	71 72 73

(2) ASK ALL

"And now I wonder if you can tell me at which one mall with at least one grocery and one department or discount store - you shop most often?"

CHECK MASTER MAP/WRITE NAME AND CODE NUMBER

Mall Name _____
Map code number _____
Other (Describe) _____

_____

None/Don't know R

(2A) ASK ALL NAMING MALL IN (2)

"And about how many times in the past eight weeks have you shopped there?"

WRITE NUMBER _____
DON'T KNOW R

(3) ASK ALL

"And at which one retail store strip do you shop most often? By that I mean a row of stores along the street."

CHECK MASTER MAP/WRITE NAME AND CODE NUMBER

Retail Strip Name _____
Map code number _____
Other Describe _____

_____ > TO (3C)

None/Don't know R TO 3(A)

(3A) ASK (3) "NONE" RESPONDENTS ONLY

"Is it true then that you rarely or never shop at a retail store strip?"

Yes, never rarely	1	TO Q(3B)
No, do shop	2	REPEAT (3)/FOLLOW SKIP INSTRUCTIONS
Don't know/DNS	R	TO Q(4)

3(B) "Why is that?"

DO NOT READ

Don't like stores	1	
Rundown physically	2	
Unattractive	3	
Too difficult to park	4	
Not enclosed (weather)	5	TO (4)
People in area make me uncomfortable	6	
Prefer to shop near work	7	
Other (Describe) _____	8	
Don't know	R	

15

(3C) ASK RESPONDENTS GIVING NAME IN (3)

"And about how many times in the past eight weeks have you shopped there?"

WRITE NUMBER _____
DON'T KNOW R

16 17

(3D) ASK (3) RESPONDENTS NAMING RETAIL STORE STRIP

"And at which other retail store strip do you shop often?"

CHECK MASTER MAP/WRITE NAME AND CODE NUMBER

Other Strip Name _____		
Map Code Number _____		
Other (Describe) _____		TO (4)
None/Don't know	R	

18 19 20

(3E) ASK RESPONDENTS GIVING NAME IN (3D)

"About how many times in the past eight weeks have you shopped there?"

WRITE NUMBER _____
DON'T KNOW R

21 22

(4) ASK ALL

"And now I'm about to read a list of factors which might influence your decision for a shopping trip. Please rate each factor on a 1-5 scale.

For each factor please tell me whether you consider it very important by giving it a 4 or 5; or not at all important by giving it a 1 or 2. A score of 3 would indicate the factor is of neutral significance in selecting a destination.

a) The first set of factors which pertain to the <u>area</u> or <u>location</u> itself.

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

b) "And now, a set of factors which pertain to the stores themselves."

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

c) "Is there anything that I have not mentioned that is very important in influencing where you shop?"

(5) CHECK BACK TO (2) AND (4)/WRITE IN ON CODING SHEET
ASK ALL NAMING MALL IN (2) AND
SCORING FACTOR A 4 OR 5 IN Q (4)

"And now I'll read some of the list again. Thinking of _____, please rate that mall
(MALL NAMED IN Q (2))
specifically on each factor by giving it a score of 5 for excellence, and 1 for poor. Again 3 would be neutral.

a) The first set of factors pertain to the area of _____
(MALL IN Q (2)

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

b) And now the set of factors which pertain to the stores in _____ (MALL IN Q (2))

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

(6) CHECK BACK TO (3) AND (4)
ASK ALL NAMING STRIP IN (3) AND SCORING A 4 OR 5 AT Q(4)

"Now I'm about to read some of these factors again. Thinking of _____ (STRIP IN Q(3)), please rate that strip by giving it a score of 5 for excellence, and 1 for poor. Again 3 would be neutral.

a) The first set of factors pertain to the area of _____ (STRIP IN Q(3)).

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

b) And now the set of factors which pertain to the stores in _____ (STRIP IN Q(3)).

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

(7) CHECK BACK TO (3D) AND (4)
ASK ALL NAMING STRIP IN (3D) AND
SCORING FACTOR A 4 OR 5 AT Q(4)

"Now I'm about to read some of these factors again. Thinking of _____, please
STRIP IN Q(3D)
rate that strip by giving it a score of 5 for excellence, and 1 for poor. Again 3 would be neutral.

a) The first set of factors pertain to the area of _____ .
STRIP Q(3D)

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

b) And now the set of factors which pertain to the stores in _____ .
STRIP IN Q(3D)

READ FACTORS INDIVIDUALLY AND SCORE ROTATE FACTORS

(8A) CHECK BACK TO Q(4)
ASK ALL RESPONDENTS RATING PARKING FACILITIES A 1 OR 2/OTHERS SKIP TO Q(9A)

"What method of transportation do you use on shopping trips?"

DO NOT READ/UP TO 3 MENTIONS

Always drive	1		
Usually drive	2		
Always transit or taxi	3	SEE BELOW	23
Usually transit or taxi	4		
Always walk or ride bike	5		24
Usually walk, sometimes drive	6		
Usually walk, sometimes use transit or taxi	7		25
Other (Describe) _____	8		
DID NOT STATE	R		

NOTE: IF EITHER OR BOTH "ALWAYS DRIVE" AND/OR "USUALLY DRIVE" ARE CIRCLED AT 8A, GO TO 8B. OTHERS SKIP TO 9.

(8B) "You said parking facilities were <u>not important</u> to you when deciding to shop, why is this?"

DO NOT READ

Parking really is important (GO BACK AND ASK Q5, 6, 7 FOR PARKING)	1	
Can always find a spot when I want one	2	26
Other (Describe) _____	3	
DID NOT SAY	R	

(9A) CHECK BACK TO Q(6)
ASK RESPONDENTS RATING PARKING A 1 OR 2/
OTHERS SKIP TO Q (9C)

"What in particular do you find difficult about _____ area's parking spaces?
STRIP IN Q (6)

DO NOT READ/UP TO 3 MENTIONS	Q9A	Q9C	
Not enough spaces	1	1	27
Too expensive	2	2	28
Don't like parallel parking	3	3	29
Parking lot too far away	4	4	30
Other (Q 9A) _____	5	5	31
(Q 9C) _____			
DNS	R	R	32

(9B) CHECK BACK TO Q(6)
ASK ALL RATING PARKING FACILITIES A 1 OR 2 AT Q(6)

"If the city were to build a new parking lot in the area, and charge 0.25 cents an hour for parking, do you think you would do more shopping there?

DO NOT READ	Q9B	Q9D	
No more shopping	0	0	33
Yes, would shop more	1	1	
Don't know/DNS	R	R	34

(9C) CHECK BACK TO Q(7)
ASK RESPONDENTS RATING PARKING FACILITIES
A 1 OR 2/OTHERS SKIP TO Q (10A)

"What in particular do you find difficult about _____ area's parking spaces?"
STRIP IN Q7

FOLLOW INSTRUCTIONS FOR Q (9A)/CODE ABOVE

(9D) ASK ALL RATING PARKING FACILITIES
1 OR 2 AT Q(7)

"If the city were to build a new parking lot in the area, and charge 0.25 cents an hour for parking, do you think you would do more shopping there?

FOLLOW INSTRUCTIONS FOR Q (9B)/CODE ABOVE

(10A) CHECK BACK TO (6)
ASK RESPONDENTS RATING STORE SELECTION 1 OR 2

"What types of additional stores do you think the _____ area needs?"
STRIP IN (6)

DO NOT READ. WRITE IN MORE SPECIFIC STORES
IF GIVEN/UP TO 6 MENTIONS

	Q10A	Q10B		
Supermarket	1	1	35 36	47 48
Specialty foods	2	2		
Clothing	3	3		
Hardware	4	4	37 38	49 50
Home furnishings	5	5		
Other retail	6	6		
A good restaurant	7	7	39 40	51 52
More entertainment facilities	8	8		
More snack or fast food	9	9		
More service outlets	10	10	41 42	53 54
Ethnic stores	11	11		
Particular chain stores	12	12		
Other (10A) _____	13	13	43 44	55 56
(10B) _____				
Don't know (PROBE FIRST)	R	R	45 46	57 58

(10B) CHECK BACK TO (7)
ASK RESPONDENTS RATING STORE SELECTION 1 OR 2

"What types of additional stores do you think the _____ area needs?"
STRIP IN Q(7)

FOLLOW INSTRUCTIONS FOR 10A. CODE ABOVE

1 2 3 4

31
5

(11A) CHECK BACK TO (6)
ASK RESPONDENTS RATING VISUAL APPEAL 1 OR 2

"What types of physical improvements do you think the _____ area needs?"
STRIP IN Q6

DO NOT READ/UP TO 6 MENTIONS	Q11A	Q11B		
Stores need face lifts	1	1	6 7	18 19
Better litter collection	2	2		
Wider sidewalks	3	3	8 9	20 21
New sidewalk pavement	4	4		
Decorative lighting	5	5		
Trees	6	6	10 11	22 23
Planters or hanging flowers	7	7		
Benches	8	8	12 13	24 25
More attractive signs	9	9		
Decorative brick sidewalks	10	10		
Other (11A) _____	11	11	14 15	26 27
(11B) _____				
None (PROBE)	R	R	16 17	28 29

(11B) CHECK BACK TO (7)
ASK RESPONDENTS RATING VISUAL APPEAL 1 OR 2

"What types of physical improvements do you think the _____ area needs?
STRIP IN Q7

FOLLOW INSTRUCTIONS FOR 11A. CODE ABOVE.

(11C) ASK ALL NAMING LOCATION AT Q(3) EXCEPT THOSE ANSWERING Q(11A)

"Would improvement in any of these items encourage you to shop at _____ more often?" STRIP IN Q(3)

READ	No	Yes	DNS	
Bike Racks	0	1	R	30 31
Decorative Street Lamps	0	2	R	
Brighter Street Lights	0	3	R	32 33
More Benches	0	4	R	
More Public Washrooms	0	5	R	34 35
More Trash Containers	0	6	R	
More Rain/Weather Cover	0	7	R	36 37
More Flowers/Trees	0	8	R	
Brick Sidewalks	0	9	R	38 39
Parking Lot	0	10	R	
Community Notice Boards	0	11	R	40 41

NOTE: IF MORE THAN 3 YES RESPONSES AT Q(11C) ASK (11D)

(11D) "Which one of (READ YES RESPONSES) is most important?"

WRITE NUMBER _____ 42 43

(12) CHECK Q(2) Q(3)
ASK ALL NAMING MALL AT Q(2)
AND (STRIP) LOCATION AT Q(3)

"And finally, although indoor malls and local strips do serve different purposes, there are many items which can be purchased at either one. 44 45

You mentioned you shop at both _____ and MALL IN Q(2) 46 47

_____. STRIP IN (3)

48 49

Generally speaking, are there any changes at _____ that could be made that might STRIP IN (3) 50 51
encourage you to shop there versus _____ more often? MALL IN Q(2) 52 53

PROBE: _____

(Li) "Did you ever shop at the Loblaws Store that used to be in the Danforth/Greenwood area near the Kentucky Fried Chicken outlet?"

Yes	1	(GO TO Q (Lii))	54
No	2	(GO TO QM))	

(Lii) "Did you also shop in the other stores near the Loblaws?"

Yes	1	(GO TO Q (Liii))	55
No	2	(GO TO QM)	

(Liii) "Has Loblaws closing changed the amount of shopping you do in the other stores in the Danforth/Greenwood area? Would you say your shopping in the area has:

READ

Increased	5	
Not changed at all	4	
Decreased slightly	3	56
Decreased moderately	2	
Decreased almost completely	1	
I never go there any more	0	

CHECK BACK TO Q(1). ASK Q(M) OF ALL CODING "138" BESIDE "MAIN GROCERY SHOPPING" AND/OR WRITING IN "LOBLAWS SUPERSTORE". OTHERS GO TO Q(13)

(Mi) "You said that you did your last main grocery shopping at the Loblaws Superstore at Leslie and Eastern. Is that correct?"

Yes	1	(GO TO Q(Miii)	57
No	0	(GO TO Q(Mii)	

(Mii) "Where did you do your last main grocery shopping?" _____

NOTE: CORRECT Q.1 GO TO Q 13

(Miii) "Where did you do most of your grocery shopping before the Loblaws store opened?"

CHECK MASTER MAP/WRITE CODE NUMBER

Map code number _____
Other (Describe) _____

Don't Know R

58 59 60

NOTE: IF ANSWER IS THE "DANFORTH/GREENWOOD AREA", GO TO Q (13)

(Miv) "Do you ever visit that store any more?"

DON'T READ

Never	0
Occasionally	1
Yes, still do a lot of shopping there	2
Don't know	R

61

1 2 3 4

(Mv) "Do you still shop in the area around that store? Would you say your shopping in that area has?"

5

READ

Increased	6
Not changed at all	5
Decreased slightly	4
Decreased moderately	3
Decreased almost completely	2
I never go there any more	1
I never did shop in the area	0
Don't know	R

6

(13A) "And finally, into which of these should I check you?"

"You live in an ..... ?"

READ

Apartment	1	
House	2	7
DNS	R	

(13B) "Including yourself, how many live in your household?"

WRITE NUMBER _____ 8 9
DON'T KNOW R

(13C) "How many are aged under 19?"

WRITE NUMBER _____ 10 11
DON'T KNOW R

(13D) "How many are aged over 65?"

WRITE NUMBER _____ 12 13
DON'T KNOW R

(13E) "Your family income (before taxes). Would that be?"

READ

$0 -20,000	1	
20,001-30,000	2	
30,001-40,000	3	14
Over 40,000	4	
DNS	R	

(13F) "What language(s) (if any) other than English is spoken at home?"

DON'T READ 15 16

None	0	French	7
Italian	1	Spanish	8
Greek	2	Polish	9
Portuguese	3	Ukranian	10
Chinese	4	Other	11
Indian	5	_____	
German	6	_____	

17 18

(13G) "Number of automobiles?"

WRITE NUMBER _____ 19
DON'T KNOW R

(13H) "Do you work (either for yourself or a company)?"

Yes 1
No 0 (GO TO Q(13K) 20

(13I) "Is that full or part time?"

Full 1
Part 2
Other 3 _____ 21
DK 9

(13J) "What are the nearest major intersections to your work place?"

_____ 22 23 24
_____

OFFICE ONLY (INTERVIEWERS DO NOT WRITE HERE)

Census Tract No. _____ 25 26
Zone No. _____

(13K) "How many years have you lived in your present home?"

WRITE YEARS AND MONTHS IF GIVEN _____ 27 28 29 30 31
DON'T KNOW R

(13L) IF LIVED LESS THAN ONE YEAR

"And what were the nearest major cross streets of your previous residence?"

_____ 32 33 34
_____

OFFICE ONLY (INTERVIEWERS DO NOT WRITE HERE)

Census Tract No. _____ 35 36
Zone No. _____

Write

Name: _____
Telephone No: _____
Date: _____
Time Completed: _____

I hereby certify that this interview was conducted according to the questionnaire and instructions for this study, and that the answers recorded stand as given by the respondents.

I also realize that a part of my work will be checked back with the respondent for verification.

_____

INTERVIEWERS SIGNATURE _____

37 38 39 40 41